

**2009 MARKET STUDY OF HEALTHCARE
PROFESSIONALS' OPINIONS RELATING TO
THE CURRENT NEEDS OF
PATIENT-CLIENTS CONSIDERING ASSISTED
LIVING CARE**

April 2009

Study Commissioned By Vantage Point Retirement Living
Exton, PA

Study Conducted By
Potyraj Marketing & Brand Solutions
Maryland Offices In Towson And The Eastern Shore

2009 MARKET STUDY
HEALTHCARE PROFESSIONALS' OPINIONS RELATING TO THE CURRENT NEEDS
OF THEIR CLIENTS AND THE CARE FACILITIES WHICH SERVE THEM

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I. Background

The increasing demands of senior-care patients, the rapid development of medical treatments, the dynamic shifts of the financial markets, and the intensive decision-making intervention of family members have combined in recent times to significantly affect the responsibilities of the healthcare professionals who provide service to these patients.

Vantage Point Retirement Living of Exton, PA (Vantage Point) which owns and operates senior-care facilities in Salisbury, Maryland and Kimberton, PA recently commissioned a market study of such healthcare professionals to better understand their changing roles and the new demands on them. By doing so, Vantage Point seeks to better align its services with their markets' needs.

II. Methodology

So as to ensure the credibility of the market study and objectivity of response comments, Vantage Point commissioned a third-party research resource -- Potyraj Marketing & Brand Solutions (PMBS) – to develop and distribute the surveys, tabulate the results, and publish this study.

PMBS produced two different questionnaires and distributed such to more than 160 discharge planners and other individuals working in healthcare roles for organizations located primarily on Maryland's Eastern Shore (specifically Wicomico, Worcester, Somerset, Dorchester, Caroline, Talbot, and Queen Anne's counties). Individuals in other parts of Southern Maryland and in Delaware were also included.

The surveys were conducted during much of February 2009 and the results were tabulated and conclusions drawn during the first two weeks of March 2009. The study yielded an above-average response rate (nearly 50 different individuals submitted responses anonymously through this research effort).

III. Major Conclusions

The following conclusions reflect learnings based on majority responses.

A. Not All Healthcare Providers Demonstrate A Great Degree Of Confidence In Recommending Care Facilities But, Nonetheless, Many Do Recommend Such Facilities.

Of the survey's respondents, approximately 60% stated that they were involved in some capacity in recommending assisted living facilities and other care centers to their patients. However, many felt their recommendations were not influential. Only one in 10 respondents thought their recommendation was an "Important Influence" to patients and family members.

B. There Exists Mixed Opinion About Whether Seniors / Elderly Are Financially Prepared For Assisted Living Facilities.

Respondents who had less experience in working with assisted living facilities were more inclined to state that individuals who should be considering ALFs were not financially prepared to enter an ALF. Those healthcare professionals who demonstrated making more recent referrals to care centers were more confident in the financial capacity of the ongoing patient.

C. The Three Most Important Criteria In Recommending Care Facilities To Patients Are: "Quality of Care", "Financial / Costs of Facility", and "Reputation of Facility."

Healthcare professionals clearly prefer those facilities which demonstrate a high quality of care for the patient and, thus, have a strong reputation within the senior care sector. Respondents also stated that the financial value of the assisted living experience was a very important consideration.

D. "Location Of Facility" And "Past Experience With Facility" Are Not Critical Criteria For Healthcare Providers.

The criteria that held the least importance for recommendation were "Location of Facility" and having had "Past Experience with Facility." Regarding location: 42% of the respondents stated that the location of the facility was only "Somewhat Important" and an additional 16% stated that location was "Not Important" when making their recommendation to a patient / family.

E: Healthcare Professionals Suggest That They Would Like To Receive More Information About Assisted Living Facilities So That They May Make Informed Recommendations.

The healthcare providers in one segment of the survey markets collectively suggested they are not receiving enough marketing communications from assisted living centers to learn about them. This finding suggests a desire from the healthcare professional to be informed and thus

make confident recommendations to patients but felt that the inbound communications from ALFs was lacking in depth.

F. The Recent Economic Downturn In This Country May Have Reduced The Number Of Potential Candidates For Assisted Living Facilities At This Time.

When healthcare professionals were queried as to why they might have made fewer patient recommendations to assisted living facilities in recent months, the most common response was that they have had fewer patients and fewer patient candidates for assisted living facilities than in the past.

*To learn more about the survey or to ask other questions
please direct your email to
John Potyraj at Potyraj Marketing & Brand Solutions at johnpotyraj@comcast.net.*