



# DC AREA SENIOR LIVING OVERVIEW

THIRD QUARTER 2016

**ROBERT HARTLEY**

DIRECTOR OF RESEARCH

THE AMERICA'S RESEARCHER OF THE YEAR

 [twitter.com/hartley\\_rob](https://twitter.com/hartley_rob)

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# DC AREA SENIOR LIVING

## BASIC FACTS

### Basic Facts



47.15% Nursing Care



35.51% Independent Living



19.27% Assisted Living

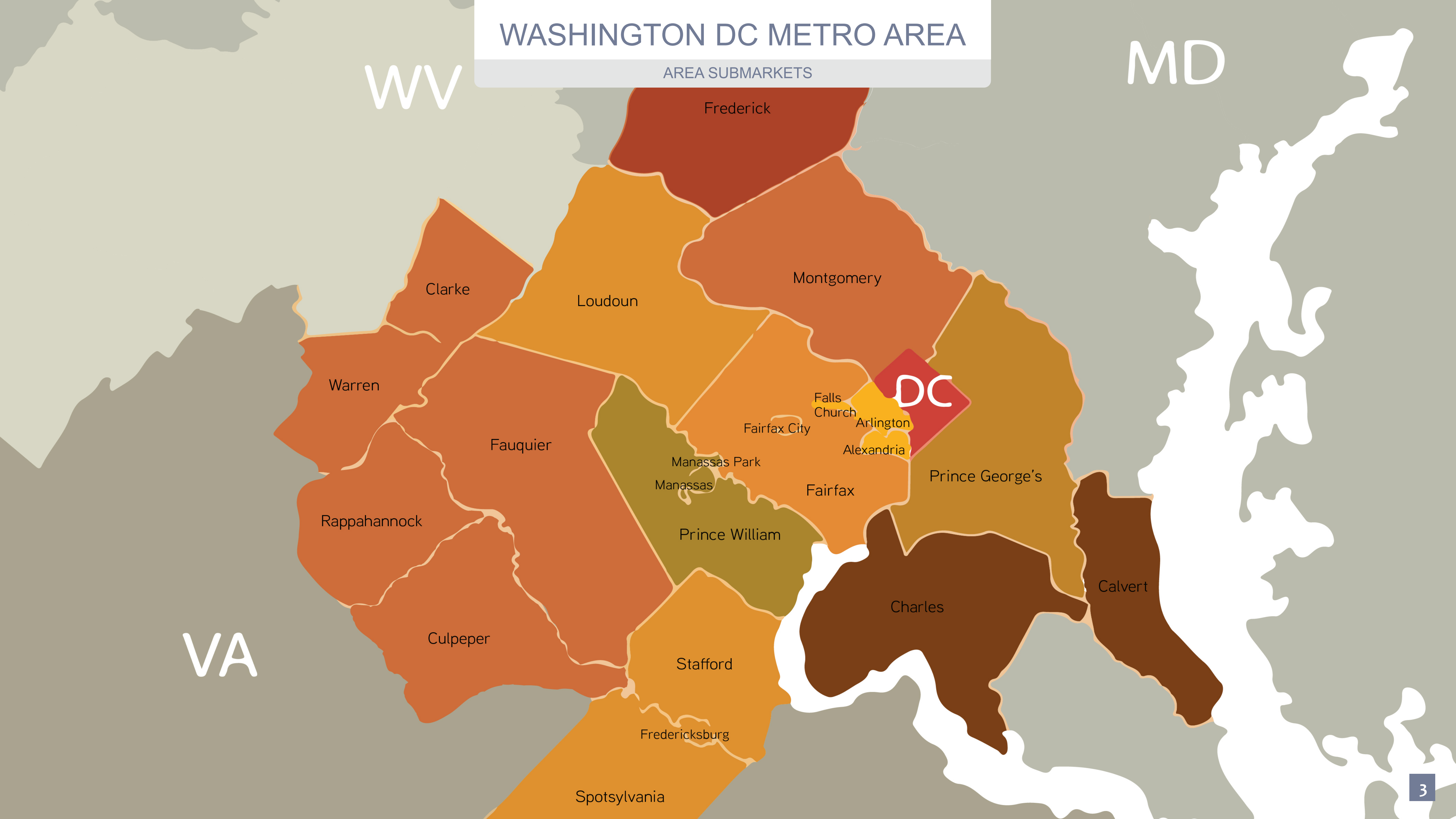


0.646% Memory Care



# WASHINGTON DC METRO AREA

AREA SUBMARKETS



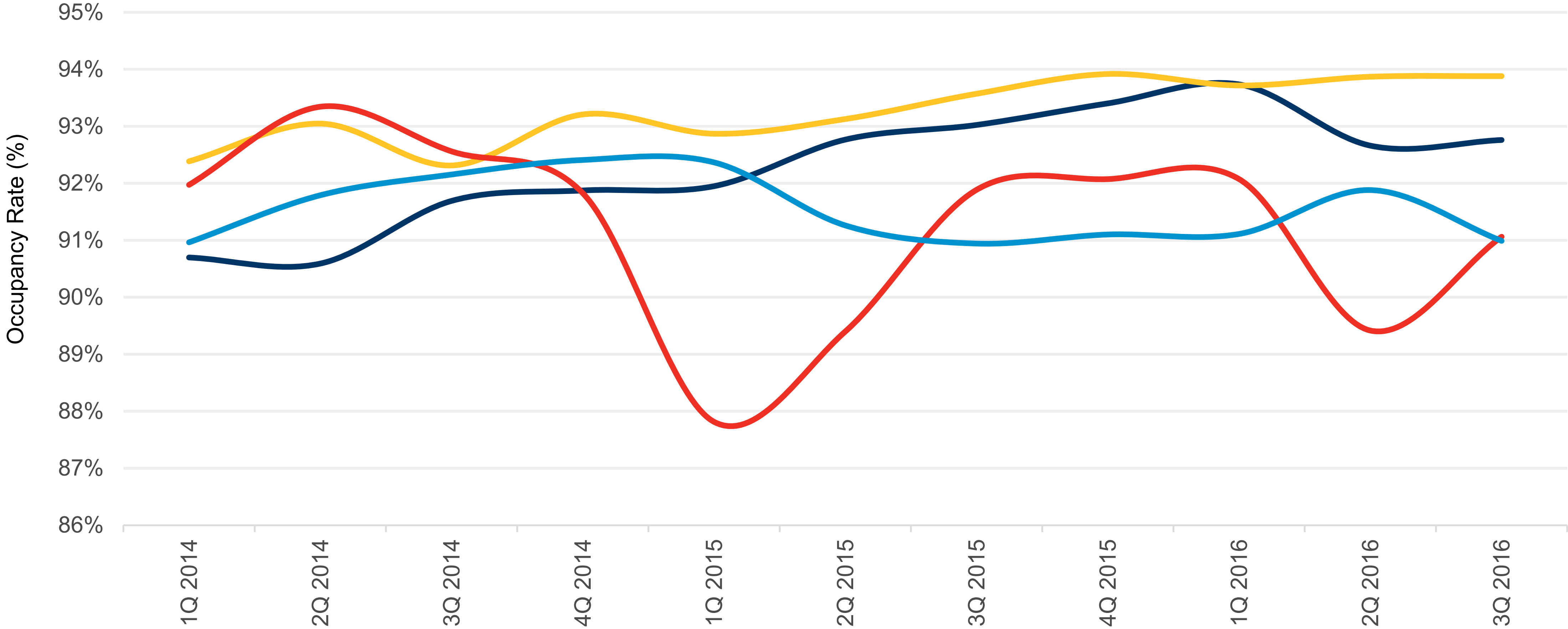
# DC AREA SENIOR LIVING OVERVIEW

THIRD QUARTER 2016

## Occupancy Rate Trends

BY PROPERTY TYPE

- Assisted Living
- Independent Living
- Memory Care
- Nursing Care



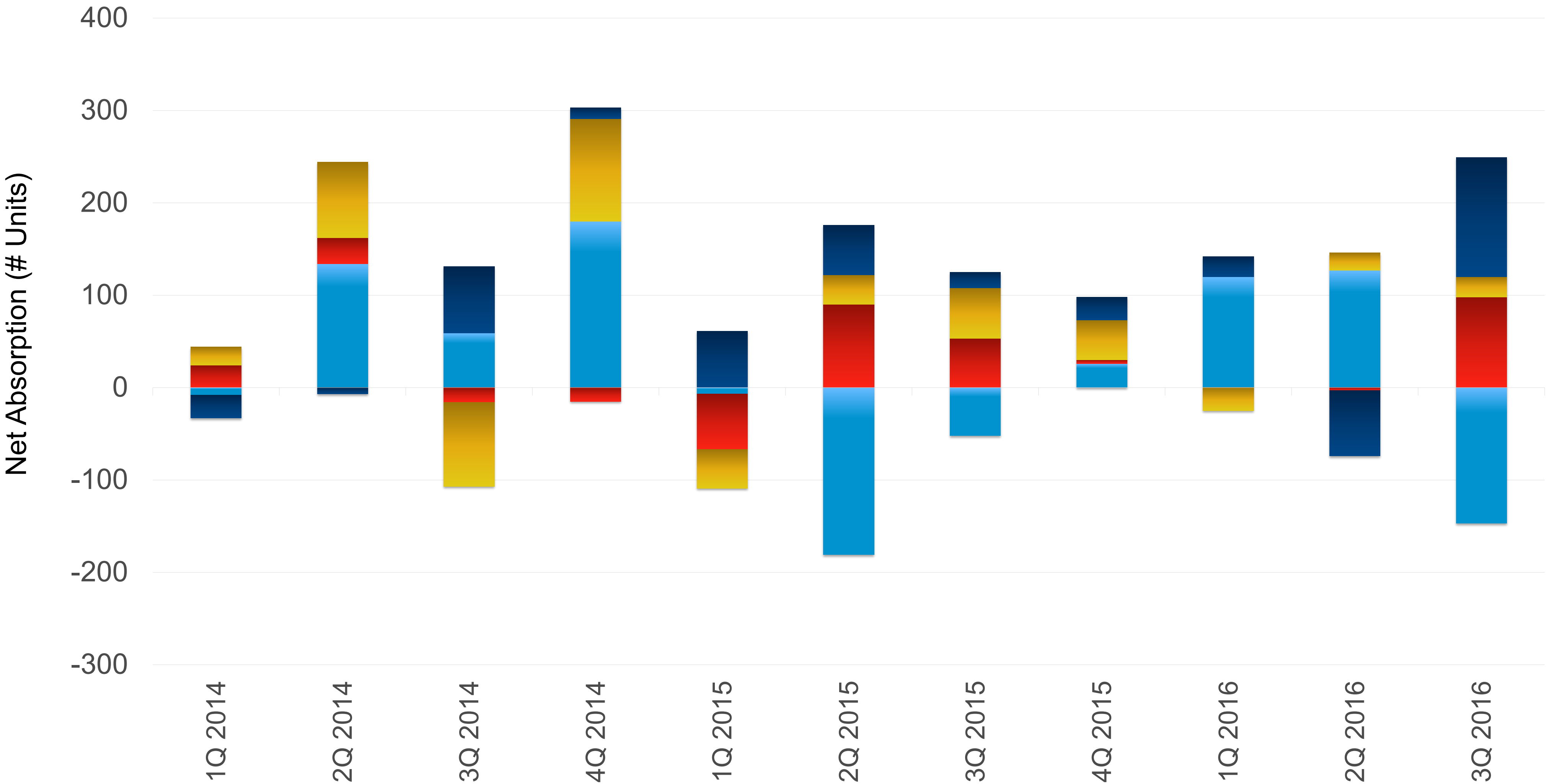
# DC AREA SENIOR LIVING OVERVIEW

THIRD QUARTER 2016

## Net Absorption

BY PROPERTY TYPE

- Assisted Living
- Memory Care
- Independent Living
- Nursing Care

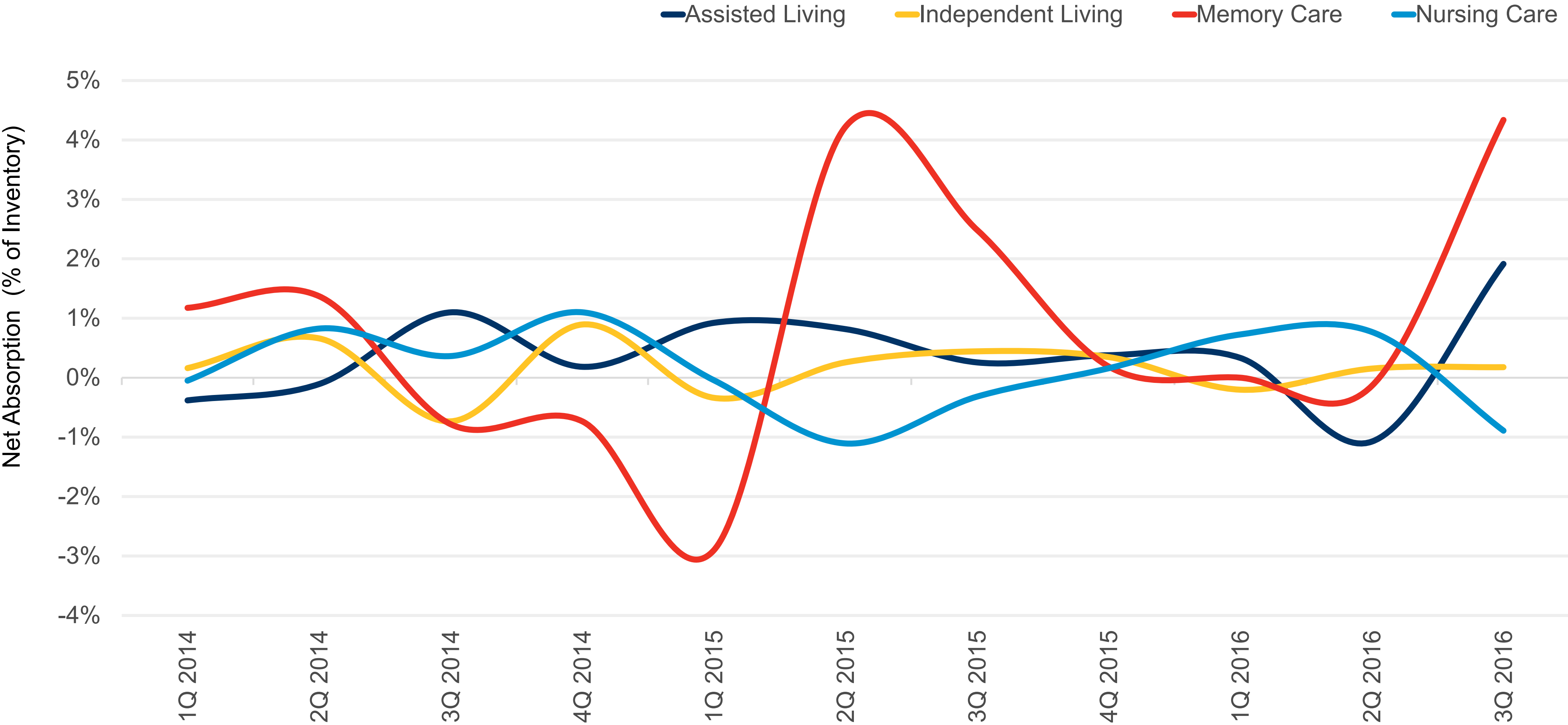


# DC AREA SENIOR LIVING OVERVIEW

THIRD QUARTER 2016

## Demand by Percent of Inventory

BY PROPERTY TYPE



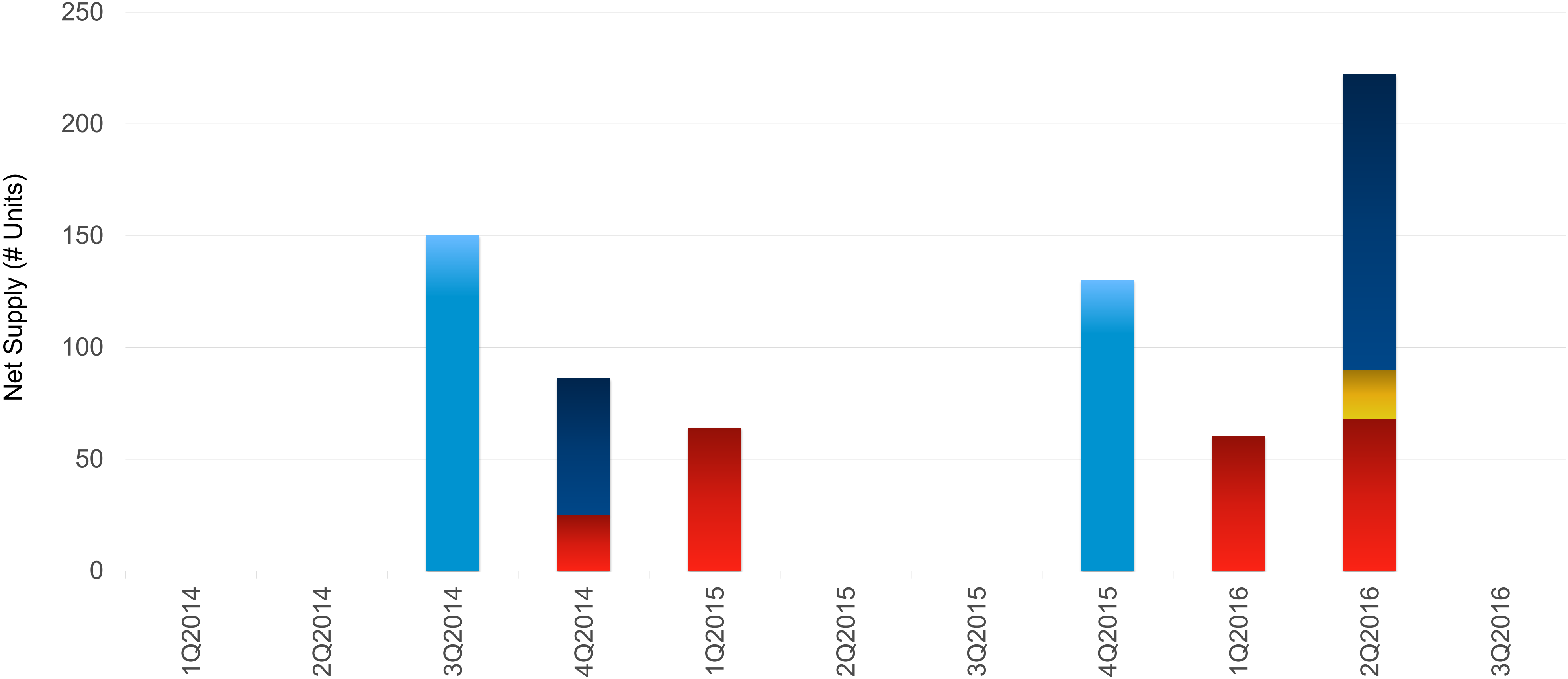
# DC AREA SENIOR LIVING OVERVIEW

THIRD QUARTER 2016

## Net Supply

BY PROPERTY TYPE

Assisted Living Independent Living Memory Care Nursing Care





# WASHINGTON DC METRO AREA

NEW SENIOR LIVING DELIVERIES

WV

MD

Frederick

Clarke

Loudoun

Montgomery

Warren

Fauquier

DC

Falls Church

Fairfax City

Arlington

Alexandria

Manassas Park

Manassas

Fairfax

Prince George's

Rappahannock

Prince William

Brightview Woodburn

Q2 2016

22 Independent Living, 51 Assisted Living,  
17 Memory Care

The Tribute at Heritage Hunt

Q2 2016

81 Assisted Living, 47 Memory Care

VA

Culpeper

Stafford

Charles

Calvert

Fredericksburg

Poet's Walk Memory Care

Q1 2016

60 Memory Care Units

Spotsylvania



# DC AREA SENIOR LIVING OVERVIEW

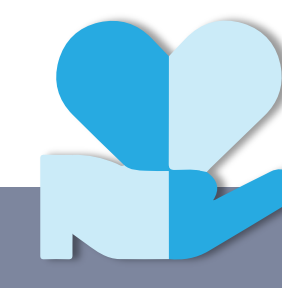
UNDER CONSTRUCTION - THIRD QUARTER 2016



NURSING  
CARE



MEMORY  
CARE



ASSISTED  
LIVING



INDEPENDENT  
LIVING

ARLINGTON/ALEXANDRIA/FALLS CHURCH	0	30	178	0
DISTRICT OF COLUMBIA	0	0	0	0
FAIRFAX/FAIRFAX CITY	0	112	76	101
FREDERICK MD	0	0	0	0
LOUDOUN	0	49	305	113
NOVA WESTERN EXUBS	0	0	0	0
PRINCE GEORGE'S	0	0	0	0
PRINCE WILLIAM	0	96	160	0
SOUTHERN SUBURBAN MARYLAND	0	0	0	0
STAFFORD/FREDERICKSBURG	0	16	44	0
MONTGOMERY	70	26	53	116
<b>TOTAL</b>	<b>70</b>	<b>329</b>	<b>816</b>	<b>330</b>

# WASHINGTON DC METRO AREA

SENIOR LIVING COMING SOON

WV

MD

Frederick

Montgomery

Clarke

Loudoun

Warren

DC

## The Crossings at Chantilly

Q4 2016

101 Independent Living, 36 Assisted Living, 24 Memory Care

## Ashleigh @ Lansdowne

Q4 2016

97 Assisted Living, 22 Memory Care

Fauquier

Fairfax City

Falls Church

Arlington

Alexandria

Manassas Park

Manassas

Fairfax

Prince George's

Rappahannock

Prince William

Calvert

Charles

Culpeper

Stafford

Fredericksburg

## Bickford of Spotsylvania

Q4 2016

44 Assisted Living, 16 Memory Care Units

VA

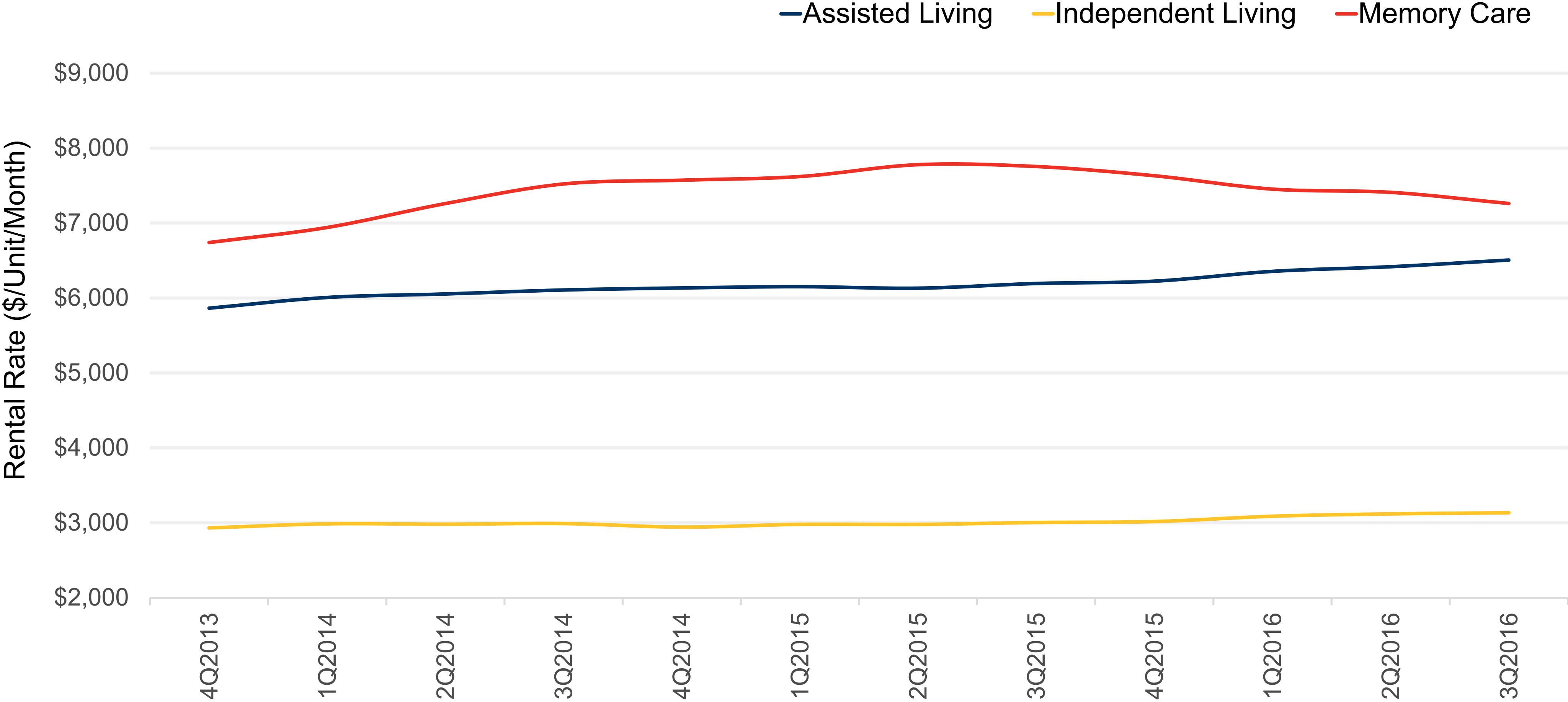
Spotsylvania

# DC AREA SENIOR LIVING OVERVIEW

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## Rental Rate Trends

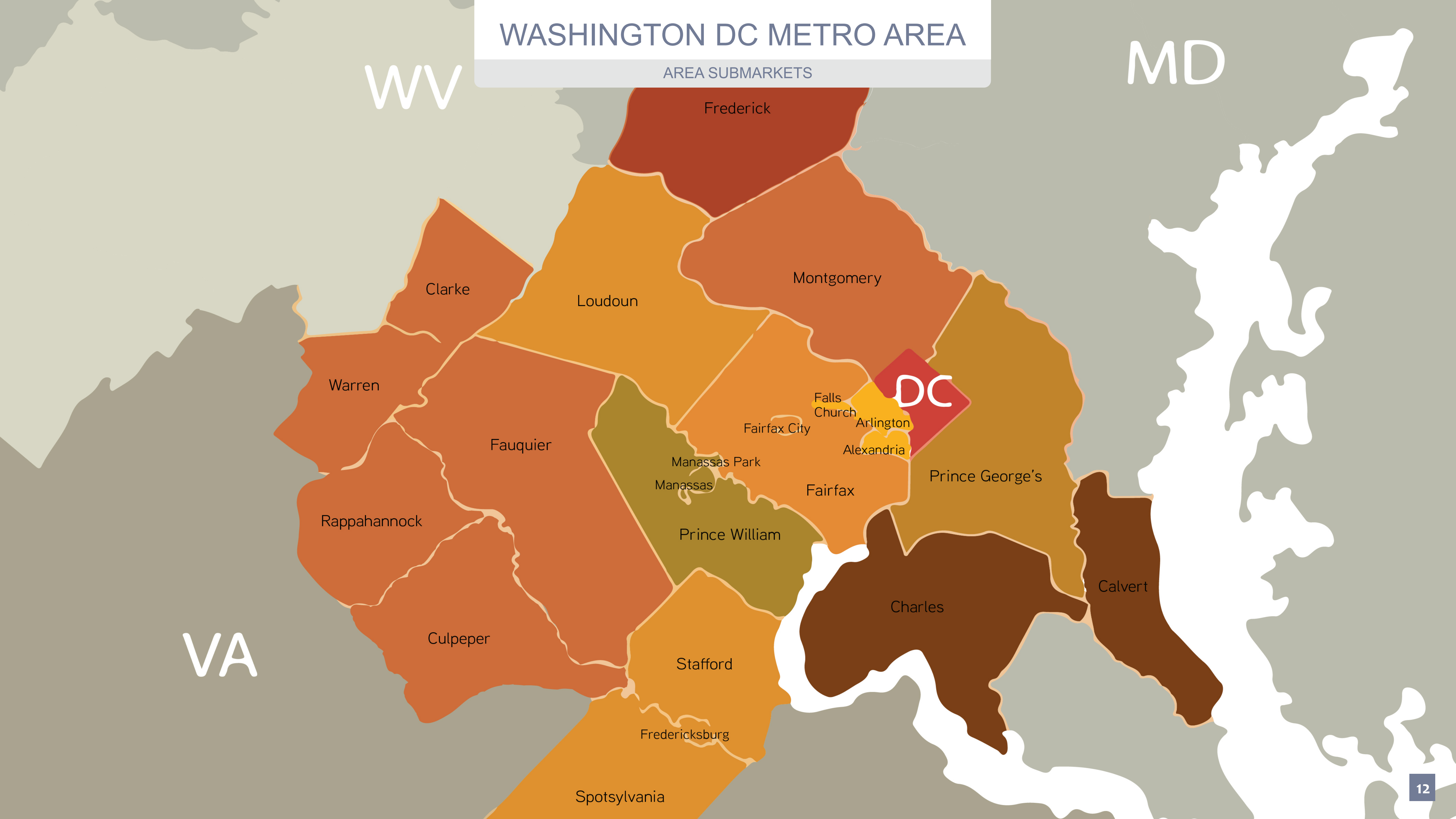
BY PROPERTY TYPE





# WASHINGTON DC METRO AREA

AREA SUBMARKETS





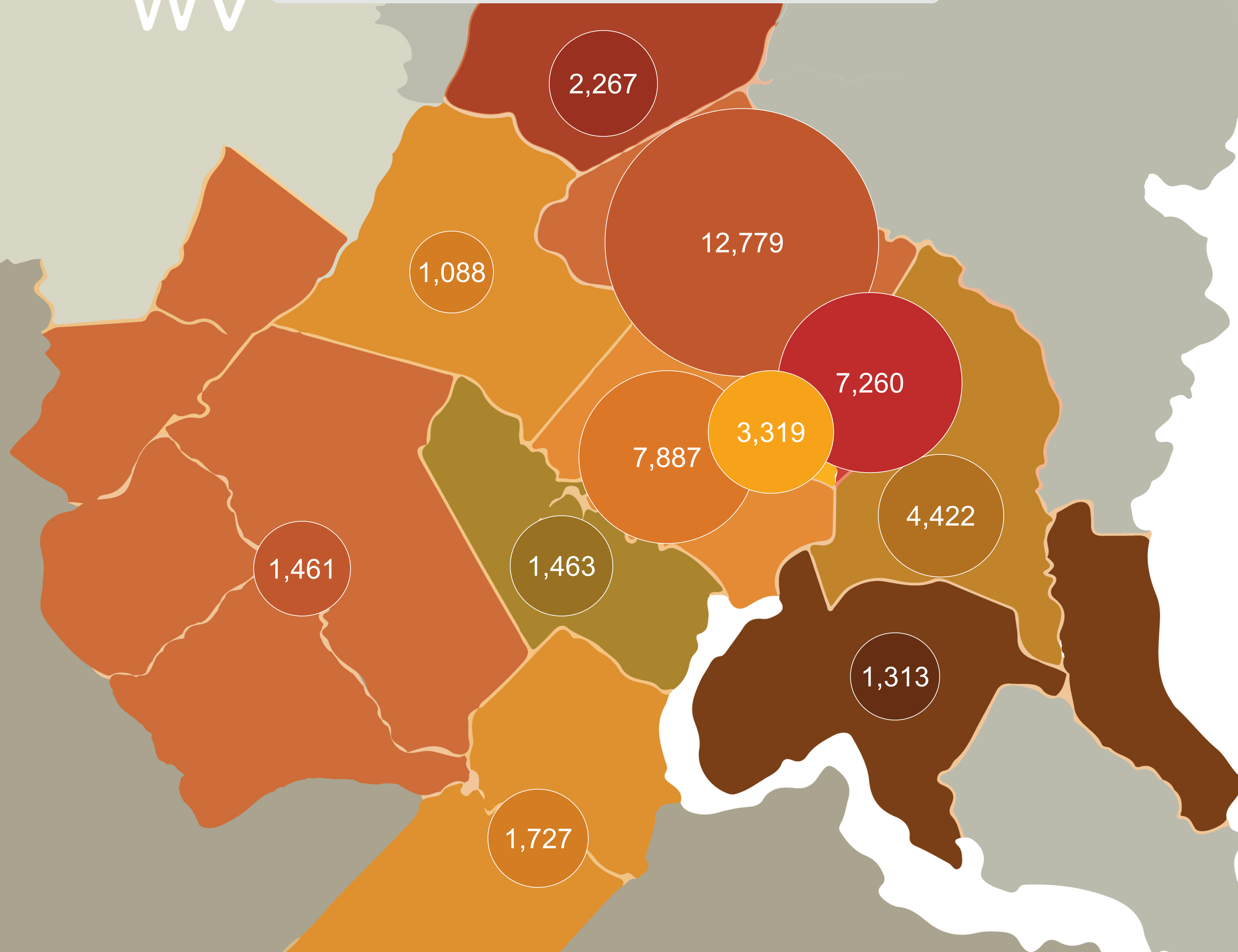
# CURRENT PENETRATION

85+ HOUSEHOLDS

VA

WV

MD



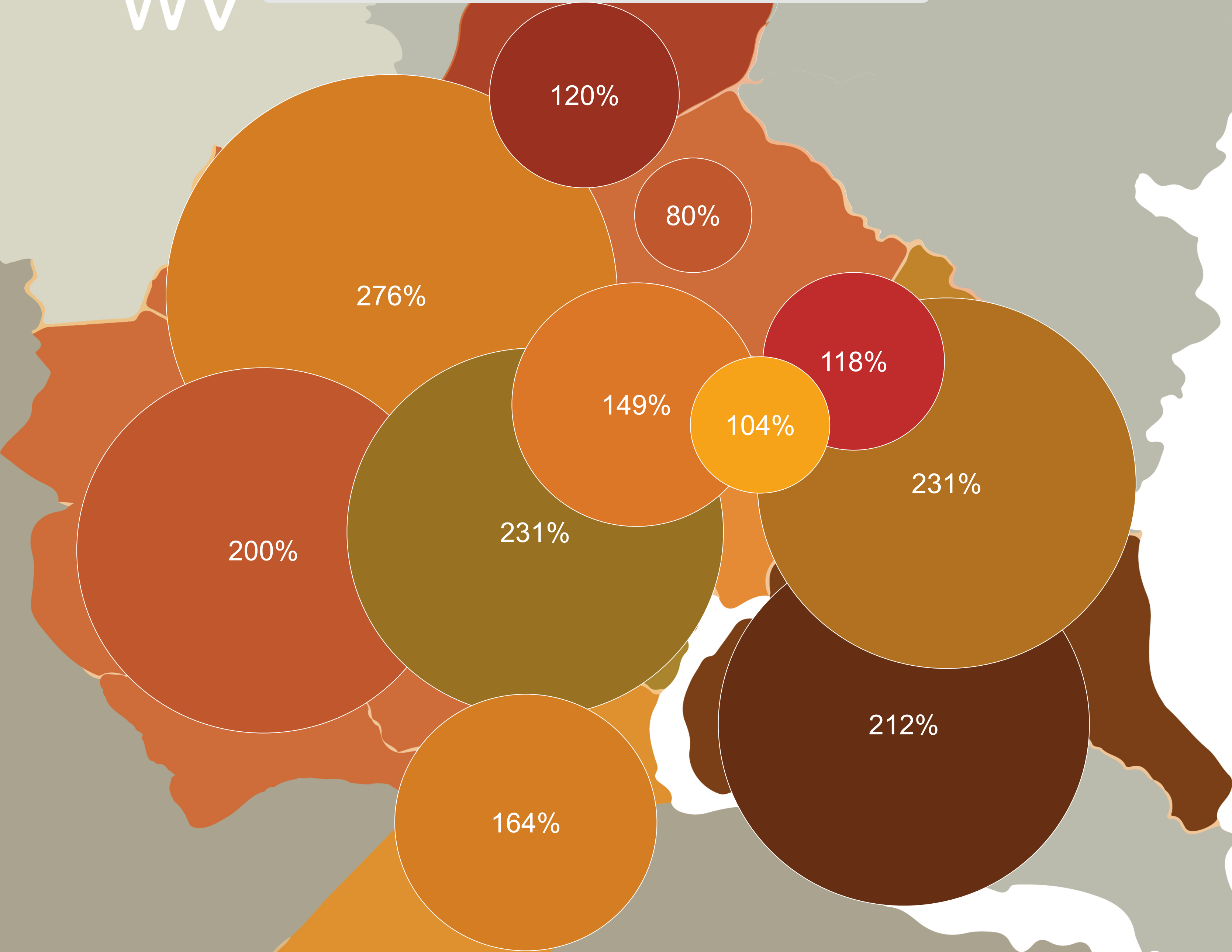
# SENIOR LIVING AGE GROWTH RATE

85+ HOUSEHOLD GROWTH NEXT 10 YEARS

WV

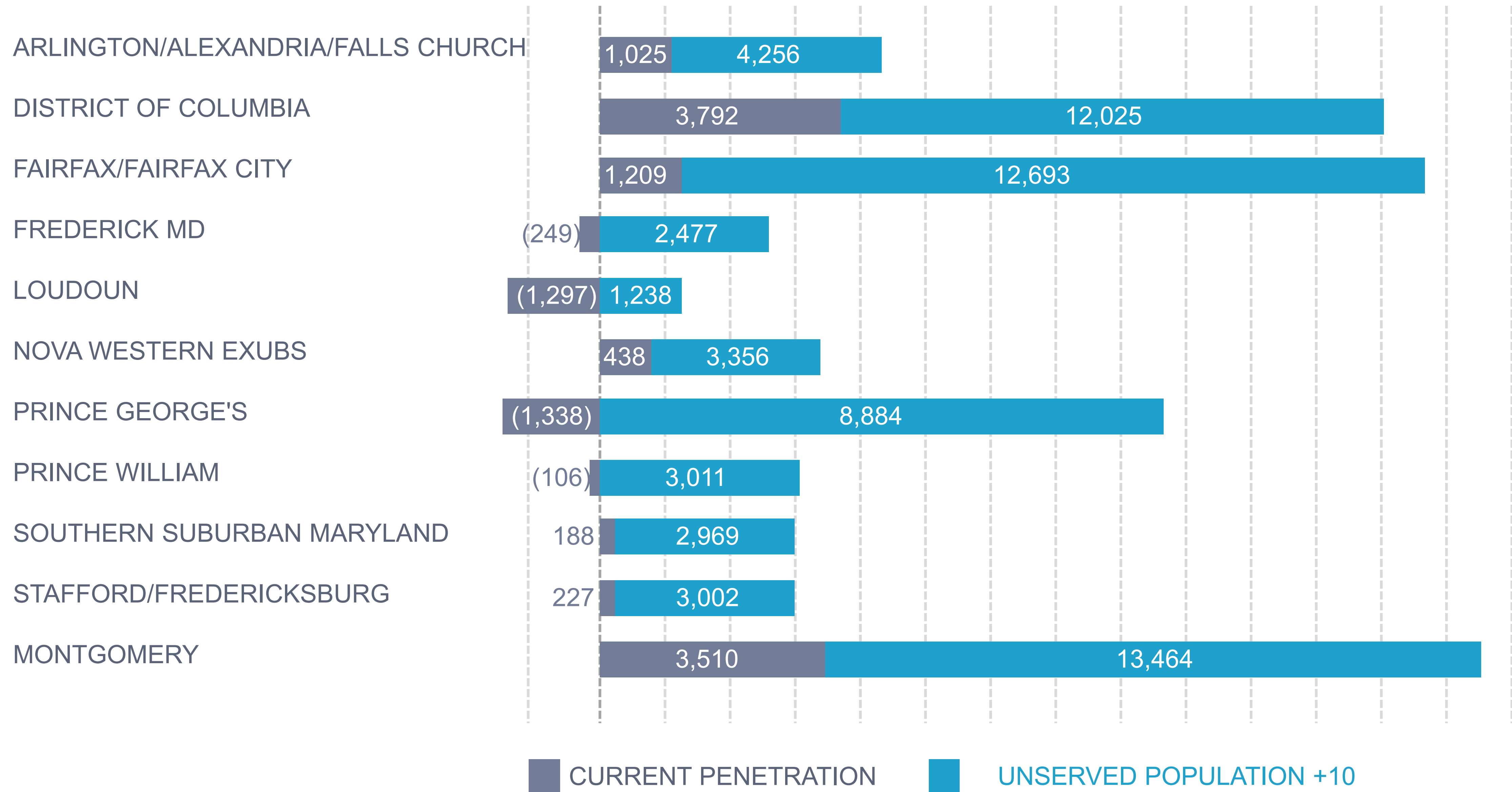
MD

VA



# UNSERVED POPULATION OPPORTUNITY

## UNSERVED HOUSEHOLDS BY MARKET

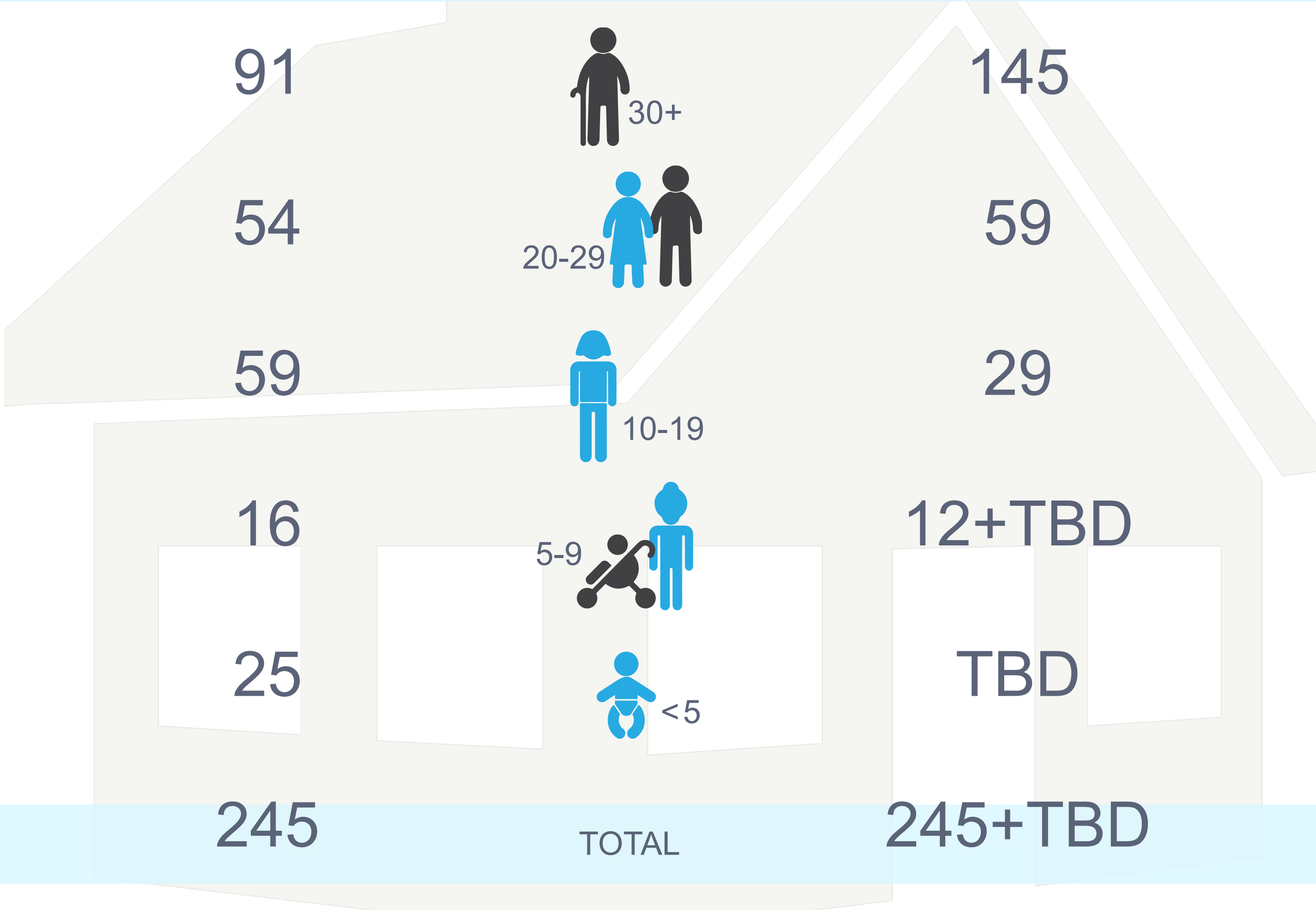


# DC AREA SENIOR LIVING OVERVIEW

FACILITY DEMOGRAPHICS - THIRD QUARTER 2016

CURRENT  
PROPERTIES

10 YEARS OUT







THANK YOU

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