



SALES AND MARKETING ROUNDTABLE #275: Insights from Mather Institute's Age Well Study with Jennifer Smith

Thank you to everyone who attended our latest Sales and Marketing Roundtable! To provide anonymity during the Roundtable discussion, participants and their communities will not be identified.

ABOUT OUR GUEST

Varsity created the Roundtable more than five years ago as a way for sales and marketing professionals from senior living communities to come together during the pandemic to share tips and advice during a very difficult time. This week marks our 275th Varsity Roundtable, and we celebrated with Jennifer Smith from Mather Institute.

Jennifer shared insights from Mather's groundbreaking *Age Well Study*, the five-year research project comparing wellness in Life Plan Communities with older adults nationwide. From social engagement to overall health outcomes, this study is shaping the conversation around senior living.



FRESH PERSPECTIVES

- **SOCIAL AND INTELLECTUAL ENGAGEMENT** – Residents in Life Plan Communities experienced increased social interactions and higher engagement in intellectual activities, unlike the broader community. This reflects the rich program offerings and resources available, fostering deeper relationships and continuous learning.
- **EMOTIONAL WELLNESS** – Despite a slight tendency for residents' emotional wellness scores to decline, they generally remained higher or similar to those of the broader community. Enhancing emotional wellness programs to address life challenges and transitions could further build on this advantage.
- **PERCEPTION OF BENEFITS** – When asked to reflect on how moving into a Life Plan Community affected their wellness, over two-thirds of respondents indicated their social wellness improved and more than one-half experienced benefits to their physical and intellectual wellness.. This highlights the communities' strength in supporting resident well-being.
- **TAILORED WELLNESS PROGRAMS** – The Person-Centric Wellness Model, emphasizing choice, growth, and community support, suggests that personalized wellness offerings can effectively enhance residents' motivation and engagement in healthy behaviors.
- **COMMUNITY COMPARISONS** – Efforts were made to make the resident and community-at-large groups comparable on age, gender, income, and race/ethnicity, yet there still may be pre-existing differences between groups that may influence wellness outcomes.
- **AGE PERCEPTION AND TRAINING** – Promoting positive views of aging is important to the wellness of older adults. Employee training to reduce subtle forms of “everyday ageism” in language and actions may increase awareness and change behaviors.

LINKS & CONTACT INFO

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Mather Institute ([website](#))
Age Well Study ([website](#))
Person-Centric Wellness Model ([website](#))

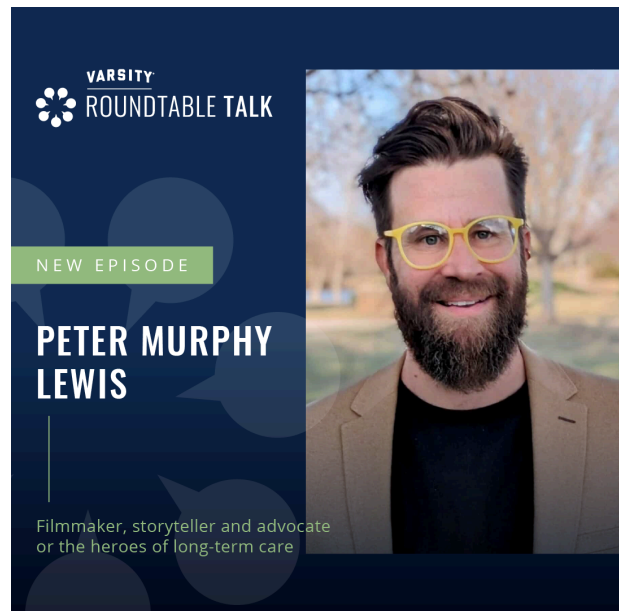
COMING UP ON VARSITY'S ROUNDTABLE!

Please join our next Roundtable gathering on Thursday, September 25 at noon ET, 11 a.m. CT and 9 a.m. PT. We'll be joined by Varsity's own Executive Creative Director Rob Smith. Rob will share fresh perspectives on how to find your community's voice, using archetypes to identify your brand's personality and the importance of having a unique brand voice.

NEW ON VARSITY'S PODCAST, ROUNDTABLE TALK

On our newest episode of Varsity's Roundtable Talk, we sit down with Peter Murphy Lewis, documentary filmmaker and co-creator of People Worth Caring About, a YouTube series that shines a spotlight on caregivers in long-term care communities across the country.

Peter shares how his grandparents' positive experiences in senior living inspired his work and why focusing on staff stories helps shift public perception. He recalls moving encounters in hospice, lessons about dignity and language, and how storytelling can inspire young people to see caregiving as a calling. Check out the [episode here](#) on the Varsity website!



AREAS OF SERVICE



Mather has a unique structure focused on creating ways to age well through various services. These include senior living communities located in Illinois, Tucson, and an upcoming one in the Tyson's, Virginia DC area.

About 25 years ago, Mather expanded its mission by adding two new services: community initiatives and Mather Institute. The community initiatives offer in-person programs in the Chicagoland area and virtual ones for older adults nationwide.

The Mather Institute where Jennifer works focuses on research around wellness and positive aging. We share innovative practices with not only our communities but also other senior living facilities. You can find reports, tip sheets, and useful information on these topics at matherinstitute.com.

The Age Well Study examines the health and wellness of residents of Life Plan Communities over time and in comparison to that of individuals in the community at large



This was a five-year study exploring the health and wellness of people living in life plan communities, compared to older adults living independently. The idea came from all the stories people shared about the social and lifestyle benefits of community living, but until then there hadn't been much hard data. Over the course of the project, findings were pulled together into five annual reports—each highlighting different aspects of resident health and well-being—which are now available on the website.



AGE WELL STUDY PARTICIPANTS

- Includes over 8,000 residents from 122 Life Plan Communities
- Responses of residents were compared to a demographically similar group of older adults living in the community at large.

The Age Well study ran from 2018 to 2022, enrolling participants and communities during the first two years. In total, about 8,000 residents across 122 life plan communities took part. Each year, they completed surveys covering everything from self-reported health and life satisfaction to social connections and physical activity. In years one and five, researchers compared these resident responses with a similar group of older adults living in the broader community to see how outcomes stacked up.

STUDY TIMELINE

Life Plan Community Residents – Age Well Study



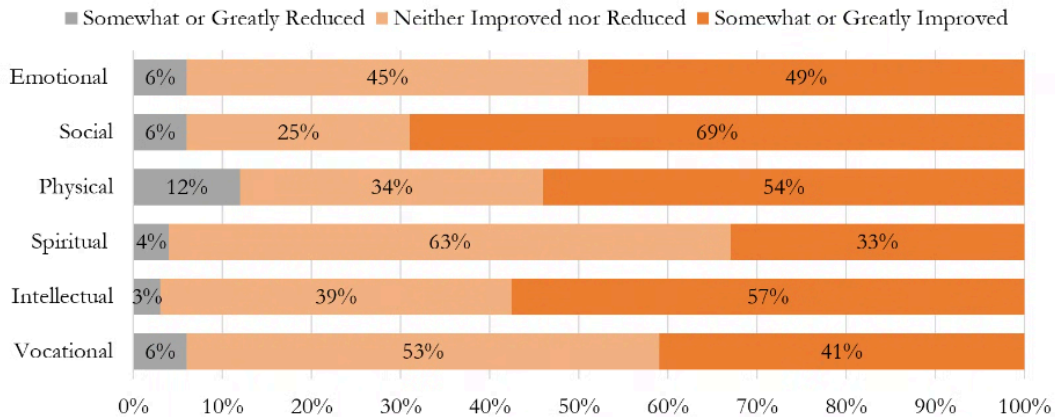
Community-dwelling Older Adults – Health & Retirement Study



Life plan community residents participated in annual surveys throughout the five-year study, while data from community-dwelling older adults came from the Health and Retirement Study, focused on years one and five. Our survey included similar questions to the Health and Retirement Study, allowing for direct comparison between the groups.

RESIDENT PERCEPTIONS

How has moving into this community affected each of the following aspects of your health?



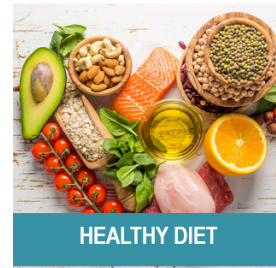
In year one, we assessed the impact of living in life plan communities on residents' health and wellness by comparing them to the broader community. Overall, residents reported better wellness in most domains, except for spiritual wellness.

Residents were asked how moving into the community affected their wellness, and over two-thirds noted improvements in social wellness.

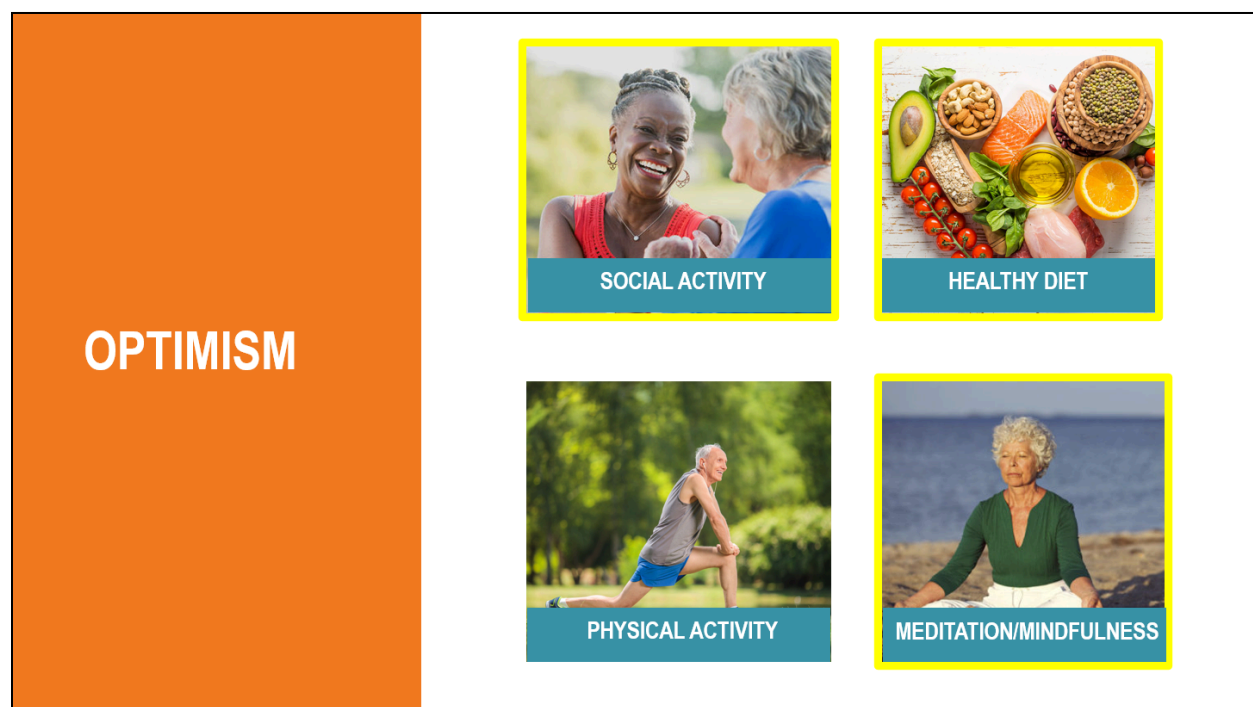
A majority also reported enhancements in physical and intellectual wellness. However, spiritual wellness saw the least change, with residents indicating that community living had little impact on this aspect.

WHICH OF THE FACTORS BELOW ARE RELATED TO HEALTHY BEHAVIORS?

- Optimism
- Perceived control
- Sense of purpose



In year two, we explored factors influencing healthy behaviors such as physical activity, social interactions, meditation, mindfulness, and diet. We examined a range of elements, including personality traits and community belonging. Additionally, we looked into psychological resources like optimism, perceived control, and sense of purpose.



We discovered that residents who were more optimistic participated in social activities more frequently, practiced meditation, and maintained healthier diets. Optimism, the tendency to expect positive future outcomes, has been consistently linked to better health and longevity. It's associated with positive attributes like goal setting and coping skills, which likely explains its connection to these behaviors.

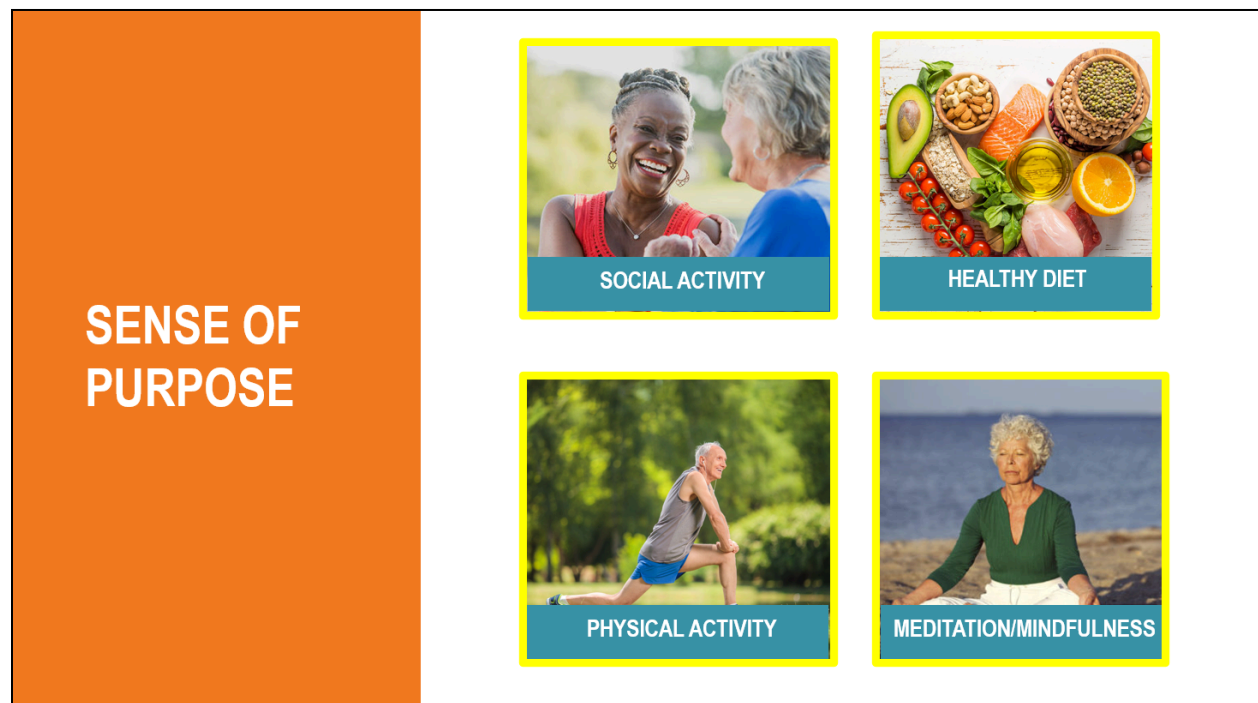
Surprisingly, we didn't find a link between optimism and physical activity, which was unexpected. This might be because we measured physical activity merely by frequency. It's possible that optimism relates more to engaging in challenging activities, trying new things, or transitioning from inactivity to active lifestyles, suggesting we might not have captured the full picture.

PERCEIVED CONTROL



Perceived control, the belief in one's ability to influence life outcomes, was linked to more frequent social interactions, a healthier diet, and increased physical activity. This makes sense since individuals with higher perceived control often exhibit more discipline and healthier choices. Interestingly, those with greater perceived control reported engaging less in meditation and mindfulness.

This is surprising as one might expect them to be disciplined in such practices. However, it could be that aspects of meditation, like non-judgmental observation and detachment, might not appeal to those who desire more control over their thoughts. This offers an intriguing perspective on the relationship between perceived control and mindfulness practices.



Residents with a strong sense of purpose demonstrated healthier behaviors across all four areas we studied. However, it's important to note that these findings are correlational. While a sense of purpose might lead to increased engagement in healthy behaviors, it's also possible that these behaviors boost one's sense of purpose.

It's likely a bidirectional relationship. For example, individuals with a strong sense of purpose may feel motivated to stay active each day, while participating in physical activity can, in turn, enhance their sense of purpose.

SOCIAL/COMMUNAL FACTORS

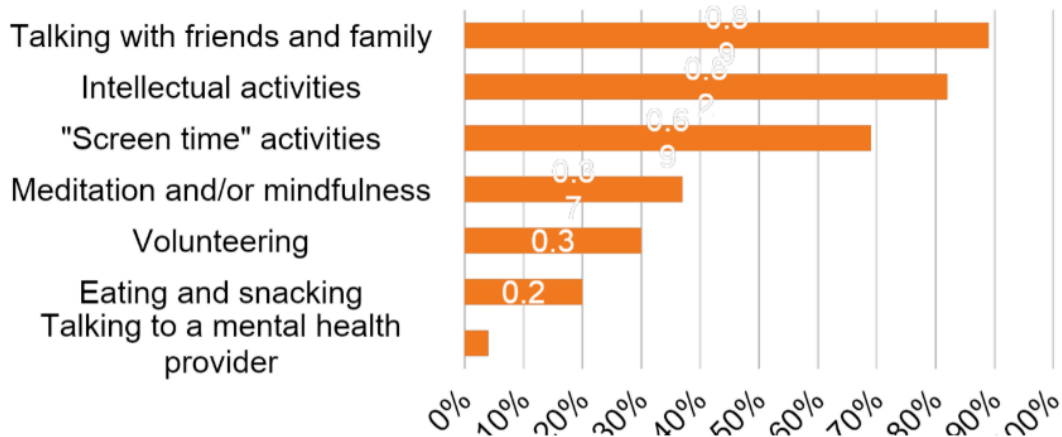
	Happiness	Life Satisfaction
Higher loneliness	↓	↓
Greater social cohesion	↑	↑
Greater community belonging	↑	↑

In year three, we examined how various factors influenced happiness and life satisfaction among residents. Research shows that happiness is associated with numerous health benefits, like lower heart rate, blood pressure, fewer aches and pains, and enhanced immune function.

Our findings highlighted the importance of social and communal factors. Residents who felt less lonely reported greater happiness and life satisfaction. Those experiencing strong social cohesion—meaning trust, willingness to help one another, and shared values—also reported higher levels of happiness. A sense of belonging within the community further enhanced these feelings of happiness and life satisfaction.

COPING STRATEGIES

Coping Strategies Used During the Pandemic



In year four, we adapted our study to focus on how residents responded to the pandemic, particularly examining factors linked to stress and resilience. Our aim was to equip communities with insights to develop wellness programs and resources for their residents. Year three data was collected just before the pandemic's onset, so it wasn't affected by the situation.

However, year four's data collection occurred afterwards and revolved around residents' coping strategies during the pandemic. The most frequently reported strategies included talking with friends and family, participating in intellectual activities, and engaging in screen time activities, like watching television and using social media, with over two-thirds of residents utilizing these approaches.

COPING STRATEGIES

	Stress
Talking with friends and family	
Intellectual activities	↓
“Screen time” activities	↑
Meditation and/or mindfulness practices	↓
Volunteering	↓
Eating and snacking	↑
Talking to a mental health provider	↑

In our analysis of coping strategies during the pandemic, we observed varying effects on stress levels. Strategies like engaging in intellectual activities, meditation, mindfulness practices, and volunteering were linked to reduced stress. Conversely, strategies such as watching TV, using the internet or social media, and snacking were associated with increased stress.

Interestingly, reaching out to a mental health provider correlated with higher stress levels, likely because those experiencing more stress sought professional help. Talking with friends and family showed no clear link to stress, possibly because the impact varied—supportive for some, but potentially stressful when faced with discussions about the world's challenges at that time.



*Compared to non-residents,
residents scored more
favorably in all domains
except spiritual and
vocational.*

VOCATIONAL

PHYSICAL

INTELLECTUAL

SOCIAL

EMOTIONAL

SPIRITUAL

In year five, we brought all our findings together by examining changes from year one through year five for residents and comparing them to older adults in the broader community using Health and Retirement Study data.

Our results showed that residents consistently exhibited better wellness than those in the broader community across physical, intellectual, social, and emotional domains. Although there were some variations, such as residents reporting slightly more depressive symptoms, the overall pattern indicated superior wellness among residents. This advantage was evident from year one and remained through year five.

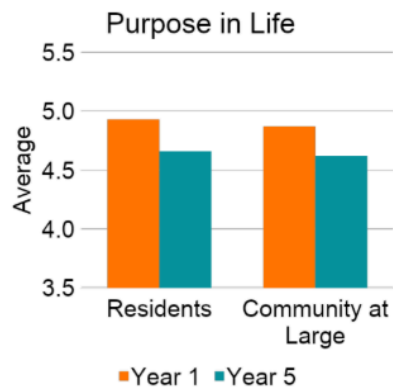
FOR PHYSICAL, VOCATIONAL, AND SPIRITUAL WELLNESS, BOTH GROUPS REPORTED SIMILAR CHANGES OVER TIME



The analyses for year one to year five indicate that both residents and the broader community experienced similar changes in physical, vocational, and spiritual wellness domains. However, residents consistently reported better self-assessed health compared to the broader community.

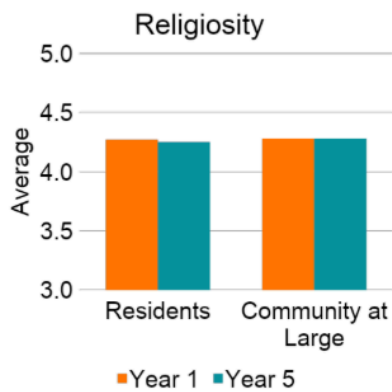
In both year one and year five, residents showed higher self-reported health scores than those in the community at large. Yet, the degree of change over the five years was similar for both groups, which was surprising. We had anticipated some decline due to aging, but expected it to be less for residents given their resources. This suggests that the issue might not be the availability of resources, but possibly encouraging their utilization—similar to having a gym membership but not using it.

FOR PHYSICAL, VOCATIONAL, AND SPIRITUAL WELLNESS, BOTH GROUPS REPORTED SIMILAR CHANGES OVER TIME



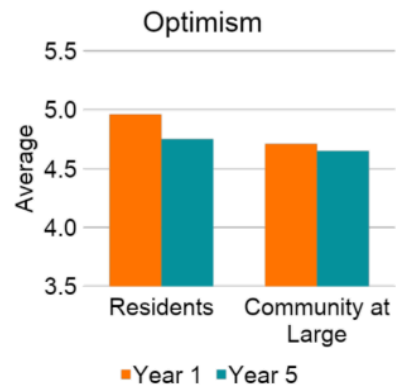
When looking at the sense of purpose in life, both residents and the broader community appeared quite similar, with no significant differences in year one and year five. Both groups experienced a similar decline over time. This suggests there might be opportunities to offer more meaningful activities or encourage continued participation in important activities for both residents and older adults in the wider community.

FOR PHYSICAL, VOCATIONAL, AND SPIRITUAL WELLNESS, BOTH GROUPS REPORTED SIMILAR CHANGES OVER TIME



Regarding religiosity, there was no notable change or difference observed, making it an interesting but not pivotal aspect of the findings

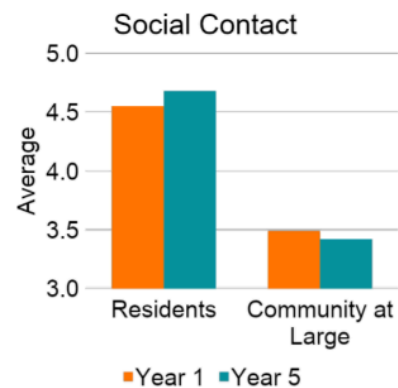
CHANGES IN EMOTIONAL WELLNESS WERE GENERALLY MORE FAVORABLE FOR THE COMMUNITY AT LARGE



In emotional wellness, changes were more notable for the community at large, which maintained stable emotional wellness scores over time. Residents, on the other hand, experienced a slight decrease in emotional wellness.

Despite this decline, residents' scores remained similar to or higher than the broader community's scores. Essentially, residents started with higher emotional wellness, experienced a slight drop, but still did not fall below the community at large. For optimism, residents saw a decrease, while the community's levels remained unchanged.

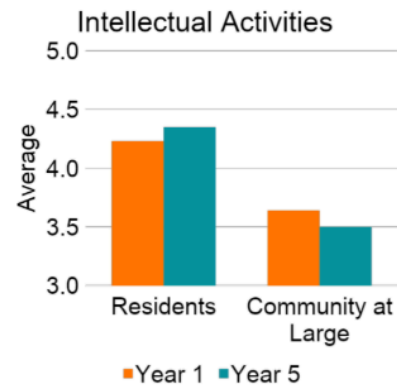
CHANGES IN SOCIAL AND INTELLECTUAL OUTCOMES WERE GENERALLY MORE FAVORABLE FOR RESIDENTS



Changes in social and intellectual outcomes were more favorable for residents compared to the broader community. Residents reported an increase in social contact, which was surprising given their already high levels of engagement in community living. In contrast, the community at large saw a slight decline in social contact.

Specifically, both groups experienced small decreases in in-person meetups, possibly due to pandemic effects, but residents increased their use of phone, email, and social media for social interaction. This might be due to residents developing deeper relationships and forming new, strong friendships over the five years.

CHANGES IN SOCIAL AND INTELLECTUAL OUTCOMES WERE GENERALLY MORE FAVORABLE FOR RESIDENTS



Engagement in intellectual activities—such as reading, playing games, attending educational programs, and writing—increased for residents but decreased for the broader community. This was particularly notable in participation in educational programs, which saw an increase among residents, while remaining largely unchanged for the community. This trend likely reflects the numerous programs and resources available to residents in the communities.

PROPOSED STRATEGIES

- Enhance offerings related to emotional wellness
- Address ageism and promote positive views of aging
- Personalize wellness offerings



Findings from the age-old study can be applied in various ways to enhance resident well-being. Notably, addressing emotional wellness, where declines were observed, could involve offering more programs to tackle life challenges, transitions, managing negative thoughts, and boosting happiness and optimism.

Additionally, perceptions of aging among residents became more negative, suggesting a need for employee training to reduce ageism, especially subtle forms. For example, offer to help, rather than insist, when residents might handle tasks themselves. This approach balances excellent service with residents' autonomy.

Also, personalized wellness programs are crucial. Our person-centric wellness model, available on our website, considers both individual characteristics and external factors to motivate engagement in wellness behaviors, emphasizing tailored support.

PERSON-CENTRIC WELLNESS MODEL



Everyone's wellness journey is unique.

We are more likely to benefit from wellness efforts when we:

- Feel like we can make choices that shape our lives (**Autonomy**)
- Feel like we can reach and celebrate our goals (**Achievement**)
- Feel connected to others (**Affiliation**)
- Are within environments that support the 3 As and reduce obstacles

This slide briefly shows the person-centric wellness model, emphasizing that people gain more benefits from wellness programs when they can make choices that shape their lives. The model highlights the importance of feeling capable of growth, reaching goals, and being supported by a community.

QUESTIONS

WHAT WAS THE GEOGRAPHIC BREADTH OF THE STUDY?

The study had an impressive geographic spread, encompassing almost every state. While life plan communities tended to cluster, the overall reach was quite extensive. The broader community data was sourced from the University of Michigan's Health and Retirement Study. Over the five years, life plan community residents participated in annual surveys.

IS THE NON-LIFE PLAN POPULATION SOCIOECONOMICALLY SIMILAR TO THE LIFE PLAN COMMUNITY?

Yes, we made efforts to ensure that the non-life plan population was socioeconomically similar to the life plan community by sampling participants from the Health and Retirement Study based on age, income, race, and ethnicity.

We also controlled for these demographic factors in our analyses to balance the groups as much as possible. However, we couldn't fully account for all initial differences, as the decision to move into a life plan community or not might stem from pre-existing differences that are beyond our control, and we can't randomly assign living situations.

COULD A CHART WITH A PINK SQUARE INDICATING PRE-RESIDENCY SELF-REPORTED HEALTH, FOLLOWED BY YEAR ONE AND YEAR FIVE DATA, EFFECTIVELY ILLUSTRATE POTENTIAL INITIAL HEALTH IMPROVEMENTS, WHILE ACCOUNTING FOR AGE-RELATED DECLINES BY YEAR FIVE?

We don't have pre-residency data, though it would be fascinating to see health metrics before moving into the communities. Typically, there's a general decline in physical health as people age, which likely influences our findings. That's why comparing residents to non-residents is crucial; differing scores could provide valuable insights for interpretation.

WHAT POINTS FROM THE STUDY ARE THE MOST COMPELLING TO TELL THE STORY THAT MOVING INTO A COMMUNITY HAS AN OBJECTIVE BENEFIT?

The most compelling point from the study is the significant social benefits of living in life plan communities. Residents experience much higher levels of social contact compared to those aging in place, and substantial research, like Harvard's 80-year longitudinal study, underscores the importance of meaningful social connections as a critical factor for a long, healthy, and happy life. This finding is a key objective benefit of moving into a community.