

Brightview Dulles Corner's memory care rooftop patio provides access to the outdoors and offers places to sit, relax, and eat, as well as opportunities to garden in a secure and safe area.

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TOP 10 TRENDS IN ASSISTED LIVING + MEMORY CARE FACILITIES

As Americans continue to age and become faced with cognitive and physical decline, the increased development activity of assisted living/memory care communities shows no signs of stopping.

10 Assisted Living/Memory Care Facilities Trends

1. More neighborhood-style assisted living communities
2. Increased technology usage
3. Attention to dining venue variety
4. Intentional outdoor spaces, especially gardens
5. Blurred lines between assisted living and memory care
6. Smaller, more defined spaces
7. Accessibility throughout the entire community
8. Rise in intergenerational and multigenerational living
9. Residents' children desire healthy, sustainable buildings
10. Renewed focus on the staff experience

BY QUINN PURCELL, MANAGING EDITOR

The assisted living/memory care market is widely expected to see strong growth in 2025 and beyond. AEC firms across the country see several opportunities in the design, planning, and construction of these facilities—from increased technology usage to implementing more intentional strategies.

Alzheimer's disease is a prevalent concern and a key driver of growth in memory care. It has gone hand-in-hand with the discussion of holistic wellness integration for residents of these facilities.

With an aging inventory of communities across the U.S., 2025 will bring renovations and expansions in addition to new construction of assisted living/memory care facilities.

While the current economic conditions are delaying most other construction work, assisted living/memory care projects are being funded and moving forward. It's one of the few markets that is currently yielding construction opportunities—"we expect this to only increase over the near future," says John Finn, LEED AP BD+C, Chief Operating Officer, W.E. O'Neil Construction.

Lawson Group Architects foresees senior housing to be the strongest asset class in the real estate market, with a sustained increase in demand that is expected to grow by 40% by 2030. However, by then approximately $400 billion will be required to address the sector's needs, according to industry data by NIC MAP Vision.

High interest rates, the rising cost of labor, and elevated construction costs still weigh down the sector. And yet, it shows little sign of slowing down.

These 10 trends represent the current and future changes occurring in the assisted living/memory care market.

1. MORE NEIGHBORHOOD-STYLE ASSISTED LIVING COMMUNITIES

We are seeing a larger amount of assisted living/memory care projects include a sizable amount of independent living.

According to David L. Mammina, AIA, Deputy Market Director of Real Estate, H2M architects + engineers, design strategies are shifting toward creating small-scale neighborhoods that can be personalized and adaptable to the needs of individual residents as well as groups.

Some memory care environments are transforming into small, purpose-built "dementia villages" that cater to authentic neighborhood connection while retaining safety and security. These allow residents to connect with the surrounding community, through shared meeting spaces, dining, parks, and more, says John Shoesmith, FAIA, NCARB, EDAC, LEED AP, Principal, Perkins Eastman.

Firms like W.E. O'Neil Construction find that the pre-planning and construction of these neighborhoods are more complicated and require a high degree of care. One positive benefit that engineering firm Kimley-Horn has found is the trend of municipalities decreasing requirements for parking spaces from two per unit to 1.1-1.6 per unit, allowing for the increased presence of inviting landscaping.



Avandell is a dementia village that blends a homelike setting within a larger community, providing residents with a sense of autonomy and interconnection.

2. INCREASED TECHNOLOGY USAGE

Seniors are more tech-savvy than ever. More than 70% of adults older than age 50 say they rely on technology to stay connected with family and friends, according to a 2022 AARP study.

This is apparent to Charles B. Kensky, PE, LEED AP BD+C, Life Care Market Leader, Bala Consulting Engineers, as technology is the largest increasing trend the firm has seen—both on the facilities side and the patient side.

The benefits of responsive technology deployment in smart hospitals are beginning to make their way into assisted living/memory care facilities. Integrated smart displays in resident rooms, real-time locating systems (RTLS), and simple automations in patient communications provide operational benefits that improve comfort and confidence in the level of care being provided, says Kensky.

Engineering firm Salas O'Brien's approach includes implementing advanced technological solutions like smartphone-driven keyless entry, gate passes, and point-of-sale transactions. Jeff Mock, CGC, Vice President, Clancy & Theys Construction, echoes this, saying developers are expected to take these capabilities into account when planning the infrastructure of floor plans to ensure they can accommodate wireless Internet needs.

With AI adoption expanding, some operators are leveraging predictive health monitoring to track



Zeb's Bistro, located in Aberdeen Ridge in Colorado Springs, Colo., is designed to offer an experience that rivals a high-end standalone restaurant and serves as a place where both independent living and assisted living residents can come together to socialize. Interior design by RDG Planning & Design.

vital signs and proactively prevent falls, according to Chris Teigen, AIA, NCARB, Vice President of Architecture, Senior Living, Ryan Companies.

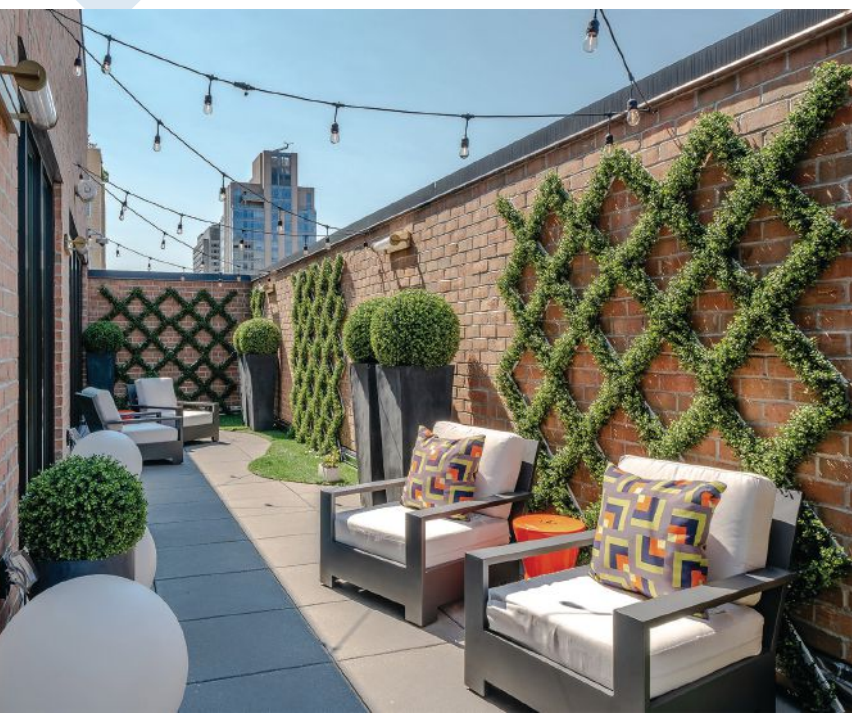
3. ATTENTION TO DINING VENUE VARIETY

More facilities are taking from independent living the luxury of dining variety. Customizable food options, a wider variety, and considerations of the community are becoming commonplace. Emerging research even finds that certain diets, like the Mediterranean-DASH Intervention for Neurodegenerative Delay (MIND) diet is linked to the decreased likelihood of developing Alzheimer's and contributes to better brain health.

Opening dining options between levels of care for all residents is beginning to take place in some non-profit communities where the notion of "one community" is celebrated, finds Hillary DeGroff, IIDA, LEED AP ID+C, Principal and Studio Practice Leader, HKS.

Hospitality focused spaces like bars and bistros are becoming common as well, even in assisted living communities, according to Mitch Elliott, AIA, Principal and Senior Living Market Leader, RDG Planning & Design. The enjoyment of food and the social aspects surrounding dining remain strong to older adults even as their abilities begin to decline.

The direction is trending toward giving higher acuity residents the same quality of life improvements that have traditionally been focused on independent living, says Meg Stevens, LEED AP, SAGE, Senior Design Manager, and Kaitlynn Howell, NCIDQ, IIDA, Senior Designer, Chipman Design Architecture.



The outdoor terrace at The Bristal at York Avenue, a 14-story all-memory care facility in Manhattan.

4. INTENTIONAL OUTDOOR SPACES, ESPECIALLY GARDENS

The connection between humans and nature shows astounding benefits, especially in older adults. Finding creative ways to incorporate nature into the daily lives of seniors in assisted living/memory care facilities is not only uplifting, but essential.

Biophilic and other wellness-oriented design strategies are making their way into a wide variety of sectors, and senior living is no different. And while indoor plants and big windows aid in providing healthy environments, it's the outdoor spaces that really matter.

Patios, pathways, and parks offer residents accessible means to enjoy the outdoors. Neighborhood-style campuses like Vincentian Schenley Gardens in Pittsburgh, Pa., incorporate connections to the outdoors through adjacencies of spaces, such as an outdoor terrace between two memory care households.

Stantec Principal and Architect Ray Pradinuk suggests making the outdoor movement of residents

visible to and from households, just like the "eyes on the street" of a house, to enrich the lives of residents and to increase the casual observation of the comings and goings of residents and visitors.

A community garden is another way to connect residents with their neighbors, Pradinuk finds. Kimley-Horn Vice President Andy Heinen, PE, has also seen a growing demand for memory or healing gardens in assisted living and memory care campuses.

5. BLURRED LINES BETWEEN ASSISTED LIVING AND MEMORY CARE

The distinction between independent living and assisted living is becoming less clear. According to Mily Repiso, EMBA, Lead Strategist, Lawson Group Architects, independent living facilities are expanding services to meet more complex care needs, while assisted living facilities are increasingly focusing on wellness and bridging the gap to memory care.

With Alzheimer's disease projected to grow to 8.2 million by 2030, firms like SmithGroup expect to see growth in the market as assisted living is often the first move residents make when early signs of Alzheimer's and related dementias appear.

"As the need for specialized care increases, we anticipate significant developments in how these spaces are designed and operated," says Alexis Burck, AIA, NCARB, Senior Principal and Senior Living Studio Leader, SmithGroup. "Personalized care and enhancing the quality of life for residents will be key drivers of innovation."

Firms like RDG Planning & Design are seeing an emphasis on communities where memory care is attached to independent living and assisted living, and can provide better support for couples than free-standing memory care environments do.

6. SMALLER, MORE DEFINED SPACES

Large, open indoor spaces are disappearing. They are instead being replaced by smaller and more defined areas, according to H2M. There may be several of these defined spaces on any given floor, which can be interconnected for staff and housekeeping to easily navigate.

"Over the past 30 years, research has proven the positive impact of smaller environments on the well-

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The Hacienda at Mission San Luis Rey in Oceanside, Calif., features a movie room for its residents.

being of residents with some dementia," says Elliott of RDG Planning & Design. While some residents prefer low-density spaces, others gravitate toward a higher-density living space because it allows for greater social engagement and connection.

Common living rooms and kitchens provide connection between most residents, while designated movie or game rooms allow for more private interactions.

Perkins Eastman's Shoesmith suggests that public environments can be scaled and arranged to support a Montessori approach to care, which involves providing familiar cues and memory supports. Similarly, the environment can use dedicated space to support staff using Teepa Snow's Hand-under-Hand approach.

7. ACCESSIBILITY THROUGHOUT ENTIRE COMMUNITY

Accessibility throughout the entire community is "crucial," says Heinen. Accessibility in assisted living/memory care communities should not be focused on just building entrances, parking lots, and public sidewalks.

Following the Covid-19 pandemic, design has become more intentional in providing adequate and accessible outdoor spaces. Amenity spaces are becoming fully accessible to all residents as well. Supporting freedom of movement in both common areas and individual units are more of an expectation, especially as aging-in-place is becoming more popular, according to RDG.

"Many assisted living apartments and common areas are now designed for full accessibility, which eliminates a 'non-support environment' as the reason for moving to a higher level of care, such as skilled nursing," says Elliot.

8. RISE IN INTERGENERATIONAL AND MULTIGENERATIONAL LIVING

The concept of multigenerational living is gaining traction nationwide, finds Mock of Clancy & Theys. As more communities are being developed in urban areas, a major shift is occurring in the seclusion of senior care facilities.

With families of residents living in these urban communities able to visit more frequently, shared amenities such as bowling or puzzling may be tailored toward multiple age groups.

Firms like Perkins Eastman have been involved in the planning of adult day and childcare programs



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A casual dining setting with indoor bowling amenities at Vivante Newport Center in Newport Beach, Calif.



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The rooftop memory care patio at Brightview Dulles Corner in Virginia overlooks the public park, playground, dog park, and sculpture adjacent to the community, in an intergenerational setting.

that share intentional intergenerational spaces. Other senior communities border nearby universities, shopping centers, churches, and other "third places" that allow for intergenerational interaction.

As intentional outdoor spaces gain traction, developing facilities near river walkways and lush greenery allow residents freedom of movement outside of their communities.

Likewise, residents of assisted living/memory care facilities are sharing more living and communal spaces with one another. Flexible bedroom layouts to accommodate specific furnishings, or memorabilia that may play to the cognitive memories and comfort of a resident, are common, says Mammina of H2M.

9. RESIDENTS' CHILDREN DESIRE HEALTHY, SUSTAINABLE BUILDINGS

While residents themselves may not be demanding sustainability initiatives, their children are increasingly advocating for greener practices, according to Greg Gouldin, LEED AP, Vice President and Client Account Manager, Erickson Senior Living, Salas O'Brien. Some of these include a focus on energy efficiency, water conservation, power resiliency, and waste management.

Older adults are particularly vulnerable to climate extremes such as heat emergencies or air pollution. Evacuating senior facilities during emergencies also poses significant challenges, so designing more sustainable and resilient facilities for seniors helps to address these issues, says Jigna Hammers, Architectural Designer, SmithGroup.

However, the children of residents are not the only ones eyeing healthy building practices. Several of Ryan Companies' clients have expressed interest in obtaining a Fitwel certification.

"We have been bringing sustainability discussions into the planning process earlier on new projects," says Teigen of Ryan Companies.

10. RENEWED FOCUS ON THE STAFF EXPERIENCE

Staff turnover and retention have become a major issue for assisted living/memory care facilities. Providing upgraded amenities such as improved staff break rooms, layouts that optimize staff efficiency, and private staff bathrooms have a big impact in improving employee retention, finds Erica Zoren, AIA, NCARB, LEED Green Associate, Associate Principal, Hord Coplan Macht.

Hammers suggests that the exponential adoption of AI will also influence workflow and potentially address the workforce shortages plaguing the industry.

"Employee retention and hiring will continue to be a challenge and something that providers will concentrate on," says Stuart Barber, AIA, LEED AP, NCARB, Principal and Senior Living Segment Leader, McMillan Pazdan Smith.

Stantec is interested in the notion that neighborhoods with new homes could also offer subsidized housing to the families of lower paid caregivers. Embedding long-term care within neighborhoods would engage the neighborhood in that care, just as neighborhoods are engaged with their public school. +