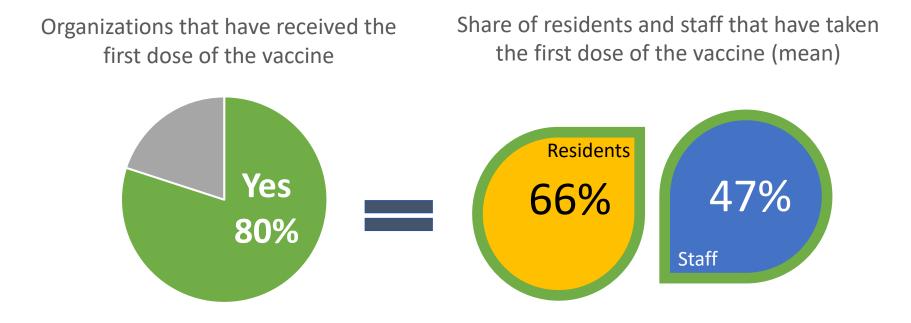


Executive Survey Insights Wave 20 January 11 - 24, 2021

• Report Graphs





Source: NIC Executive Survey Insights

Wave 20 responses collected January 11 to January 24, 2021

Organizations made the following efforts to encourage vaccination acceptance among residents and staff (in order of frequency of mention)

- Education/communication campaigns for residents and staff
- One-on-one community leadership support
- Presentations by local health authorities, specialists, pharmacies, etc.
- Education/communication campaigns for family
- Use of social media (education, promotion, recognition)
- Management leadership by example (taking the vaccine)
- Non-cash incentives for staff such as prize drawings, PTO, special recognition
- Financial incentives for staff
- Resident and staff "champions"

Source: NIC Executive Survey Insights

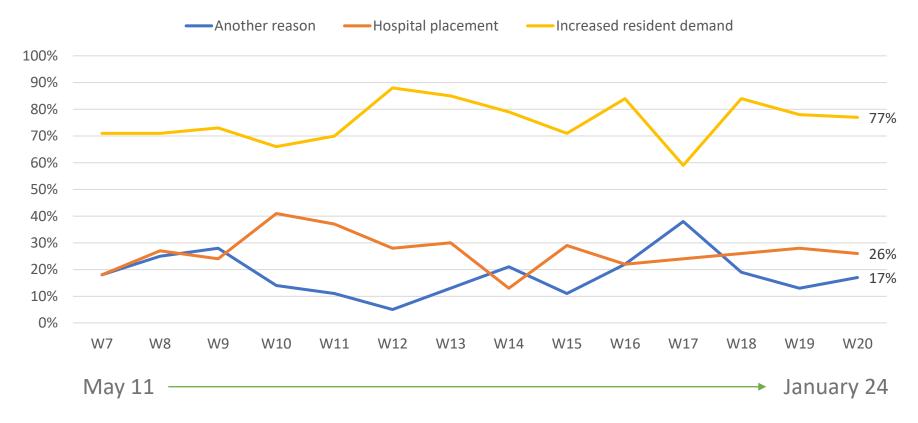
Wave 20 responses collected January 11 to January 24, 2021

W18 W19 W20 W18 W19 W20 W17 W18 W19 W20 W18 W19 W20 W17 W17 W17 100% 13% 20% 20% 21% 21% 90% 25% 23% 25% 26% 26% 27% 27% 28% 31% 33% 36% 80% 70% 35% 20% 25% 60% 56% 30% 44% 30% 36% 48% 45% 56% 46% 47% 34% 50% 35% 48% 40% 60% 30% 52% 48% 42% 43% 20% 38% 35% 33% 30% 29% 29% 28% 27% 24% 23% 21% 10% 0% Independent Assisted Memory Nursing Care Care Living Living Decelerated ■ No change Accelerated

Wave 17 responses collected November 30 to December 13, 2020 Wave 18 responses collected December 14 to December 27, 2020 Wave 19 responses collected December 28, 2020 to January 10, 2021 Wave 20 responses collected January 11 to January 24, 2021 Totals may not add to 100% due to rounding Source: NIC Executive Survey Insights

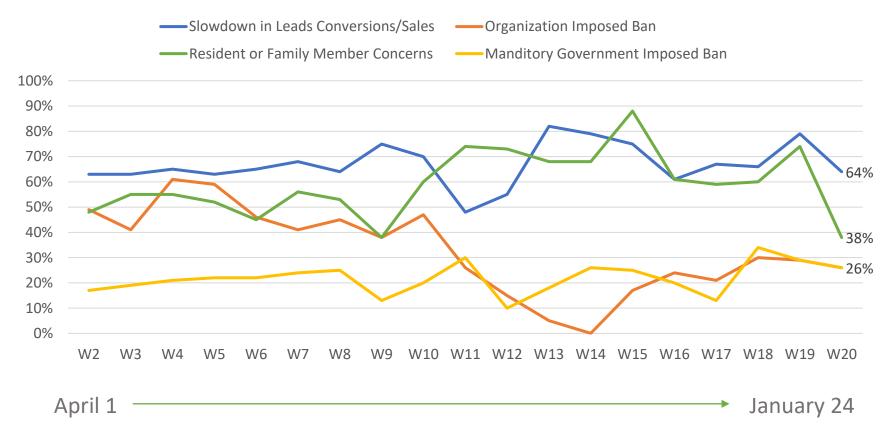
Pace of Move-Ins in Past 30-Days

Reasons for Acceleration in Move-Ins in Past 30-Days



Question was not asked prior to May 11, 2020 Source: NIC Executive Survey Insights

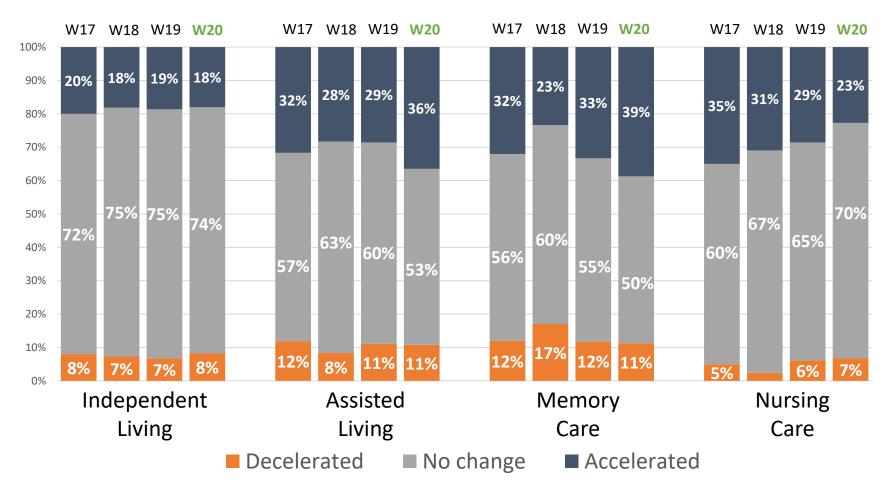
Reasons for Deceleration in Move-Ins in Past 30-Days



Question was not asked prior to April 1, 2020 Source: NIC Executive Survey Insights

Organizations With Multiple Properties Offering Rent Concessions In... Up to one-All of our quarter of our properties properties 26% 26% Up to one-half ofour properties More than one-16% half of our 32%

Source: NIC Executive Survey Insights Wave 20 responses collected January 11 to January 24, 2021



Pace of Move-Outs in Past 30-Days

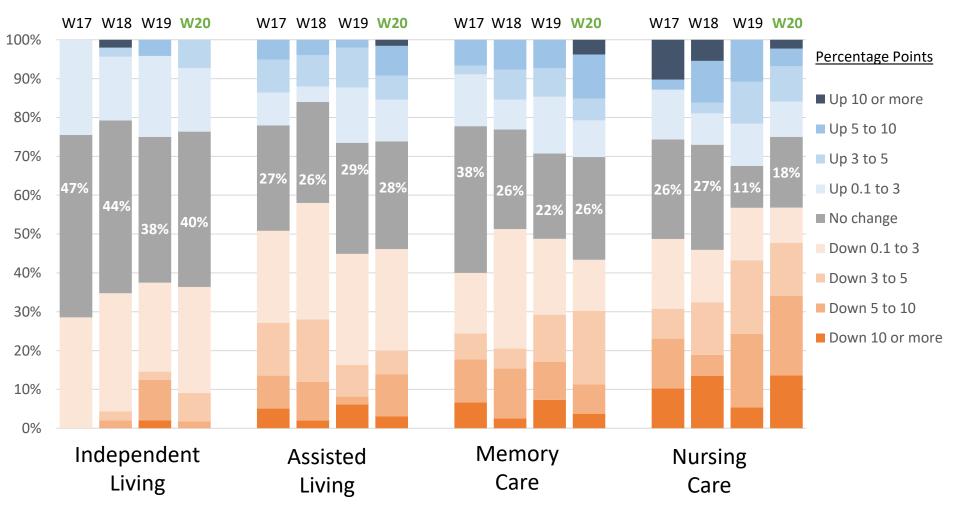
Wave 17 responses collected November 30 to December 13, 2020 Wave 18 responses collected December 14 to December 27, 2020 Wave 19 responses collected December 28, 2020 to January 10, 2021 Wave 20 responses collected January 11 to January 24, 2021 Totals may not add to 100% due to rounding Source: NIC Executive Survey Insights

W18 W19 W20 W17 W18 W19 W20 W17 W18 W19 W20 W17 W18 W19 W20 W17 100% 16% 21% 90% 22% 22% 23% 24% 24% 25% 26% 25% 26% 27% 27% 29% 30% 32% 80% 70% 38% 26% 18% 29% 27% 11% 26% 26% 26% 60% 28% 27% 22% 47% 44% 40% 50% 38% 40% 30% 58% 57% 57% 51% 51% 49% 49% 46% 46% 45% 43% 40% 20% 38% 36% 35% 29% 10% 0% Independent Assisted Memory Nursing Care Care Living Living Decreased ■ No change Increased

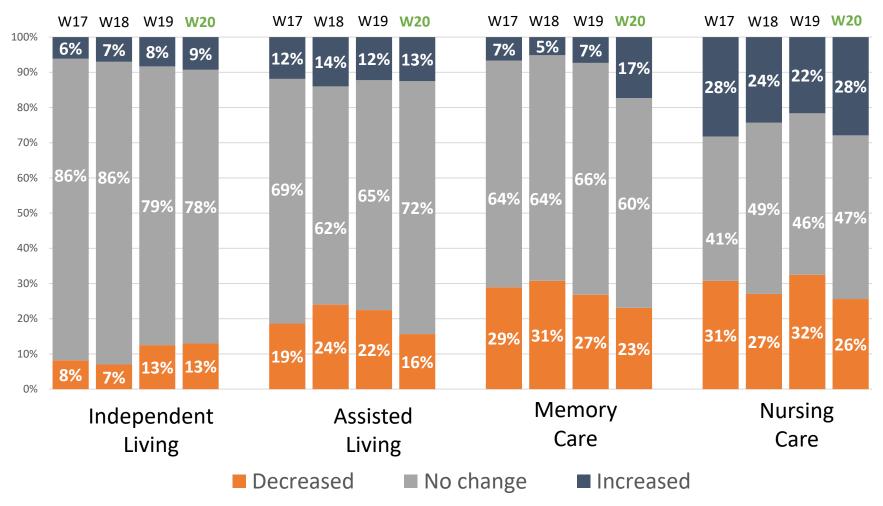
Change in Occupancy by Care Segment: Current vs. One Month Prior

Wave 17 responses collected November 30 to December 13, 2020 Wave 18 responses collected December 14 to December 27, 2020 Wave 19 responses collected December 28, 2020 to January 10, 2021 Wave 20 responses collected January 11 to January 24, 2021 Totals may not add to 100% due to rounding Source: NIC Executive Survey Insights

Change in Occupancy By Care Segment: Current vs. One Month Prior



Wave 17 responses collected November 30 to December 13, 2020 Wave 18 responses collected December 14 to December 27, 2020 Wave 19 responses collected December 28, 2020 to January 10, 2021 Wave 20 responses collected January 11 to January 24, 2021 Totals may not add to 100% due to rounding Source: NIC Executive Survey Insights



Change in Occupancy by Care Segment: Current vs. One Week Prior

Wave 17 responses collected November 30 to December 13, 2020 Wave 18 responses collected December 14 to December 27, 2020 Wave 19 responses collected December 28, 2020 to January 10, 2021 Wave 20 responses collected January 11 to January 24, 2021 Totals may not add to 100% due to rounding

Source: NIC Executive Survey Insights