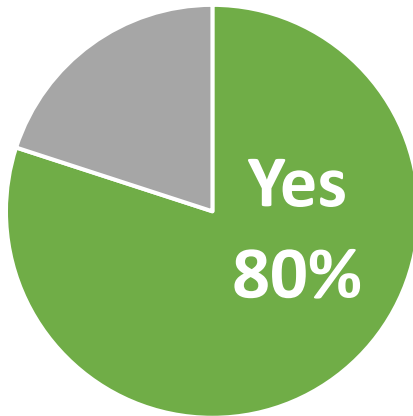


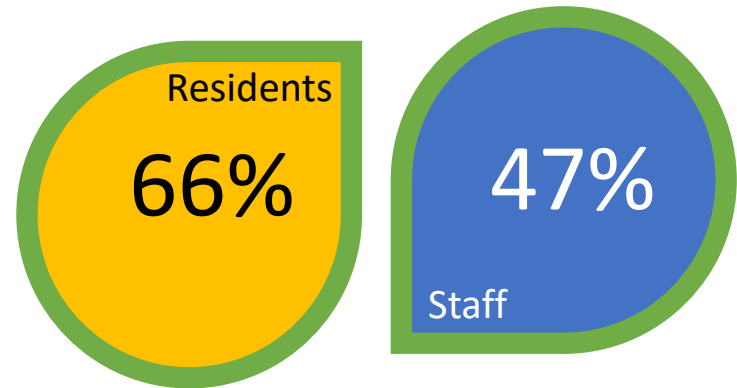
Executive Survey Insights Wave 20 January 11 - 24, 2021

- Report Graphs

Organizations that have received the first dose of the vaccine



Share of residents and staff that have taken the first dose of the vaccine (mean)



Source: NIC Executive Survey Insights

Wave 20 responses collected January 11 to January 24, 2021

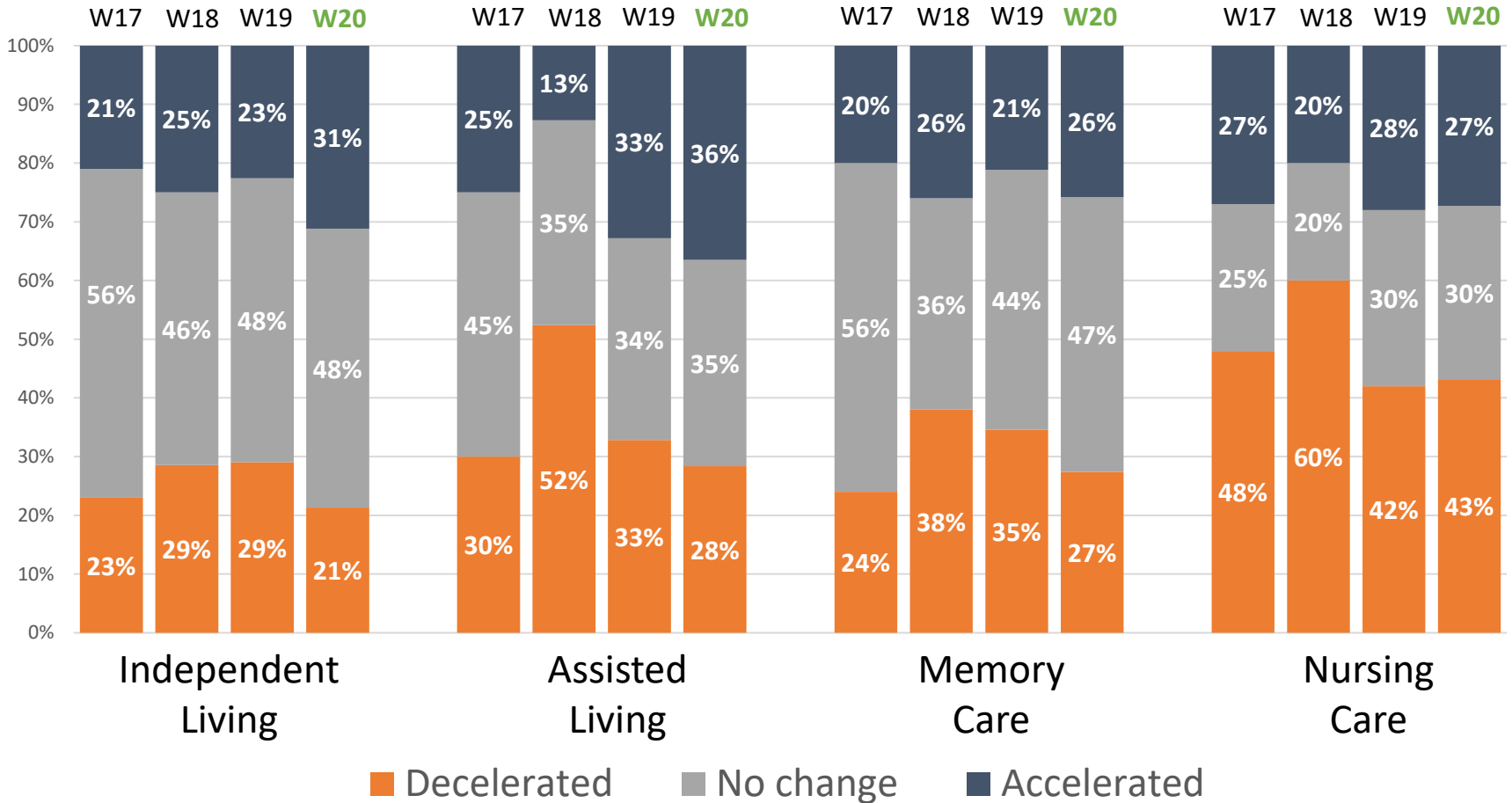
Organizations made the following efforts to encourage vaccination acceptance among residents and staff (in order of frequency of mention)

- 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

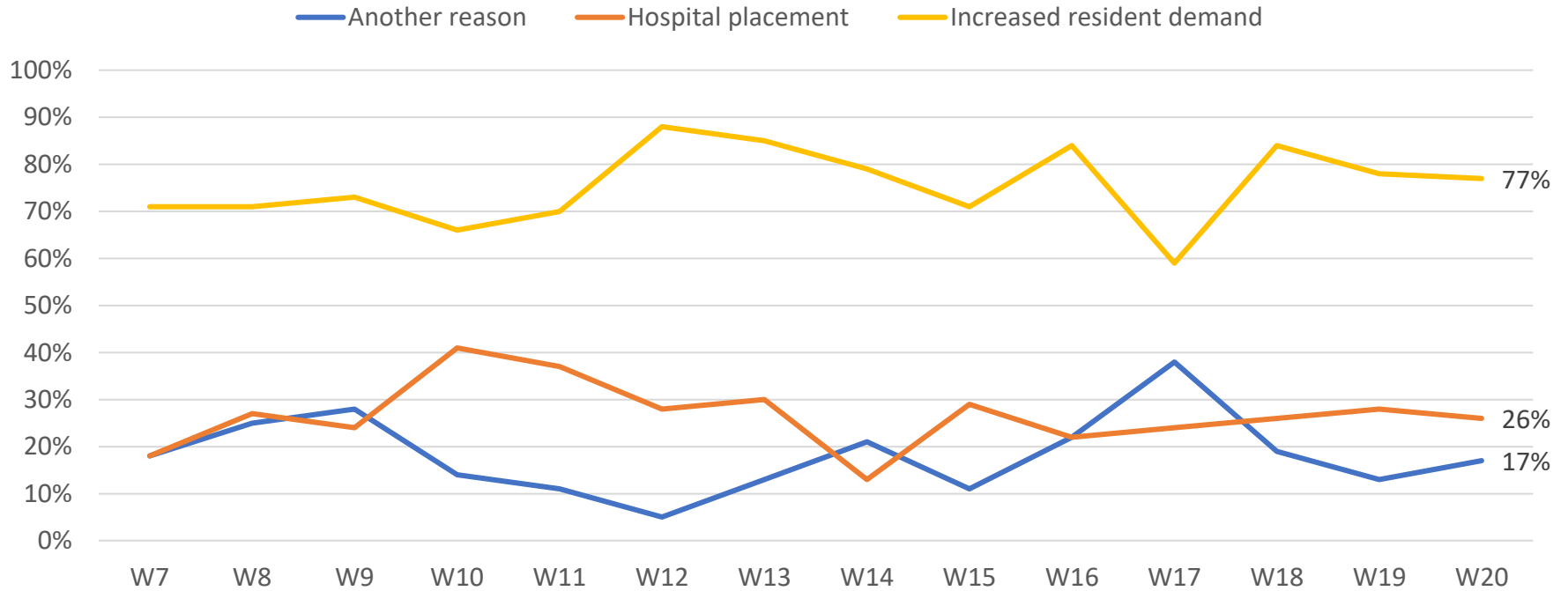
Wave 20 responses collected January 11 to January 24, 2021

Pace of Move-Ins 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

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



May 11

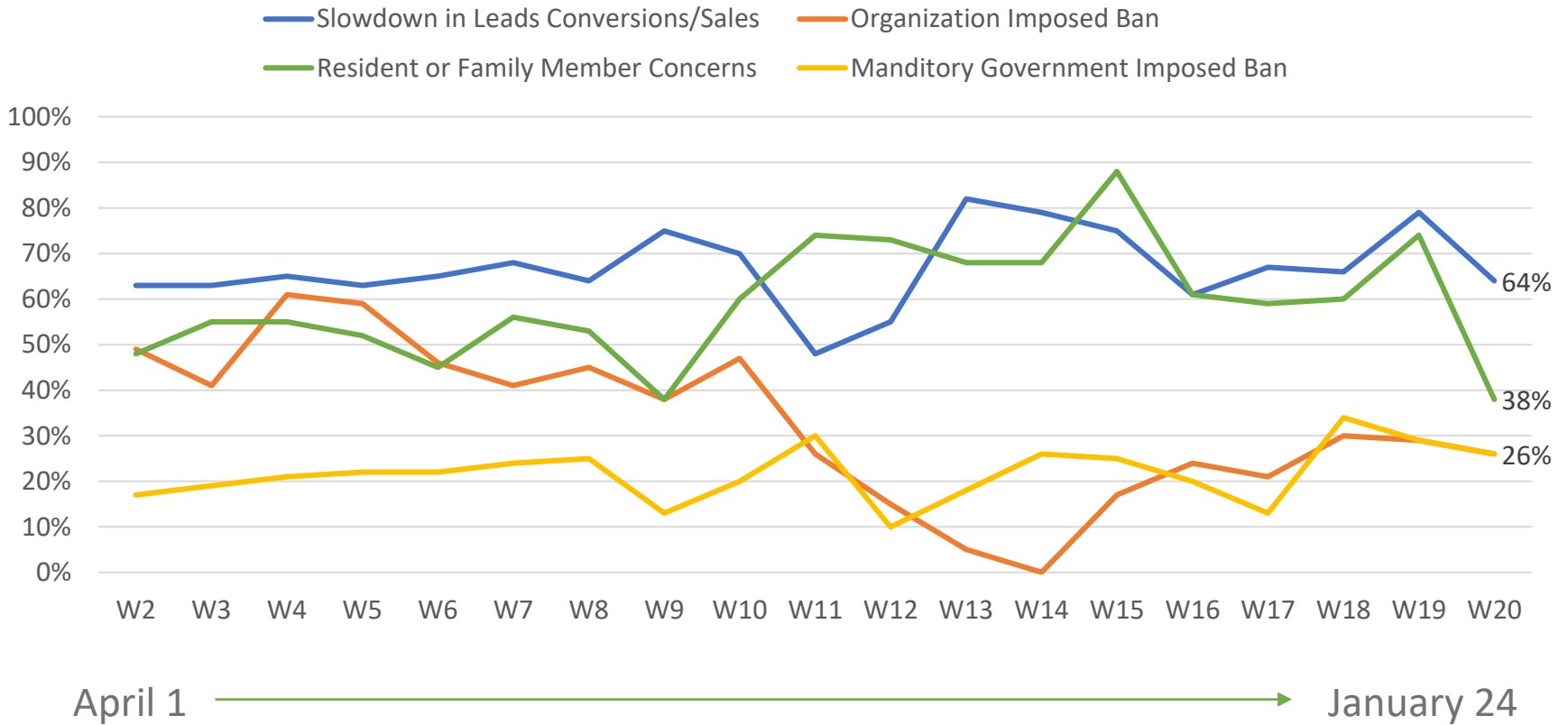


January 24

Question was not asked prior to May 11, 2020

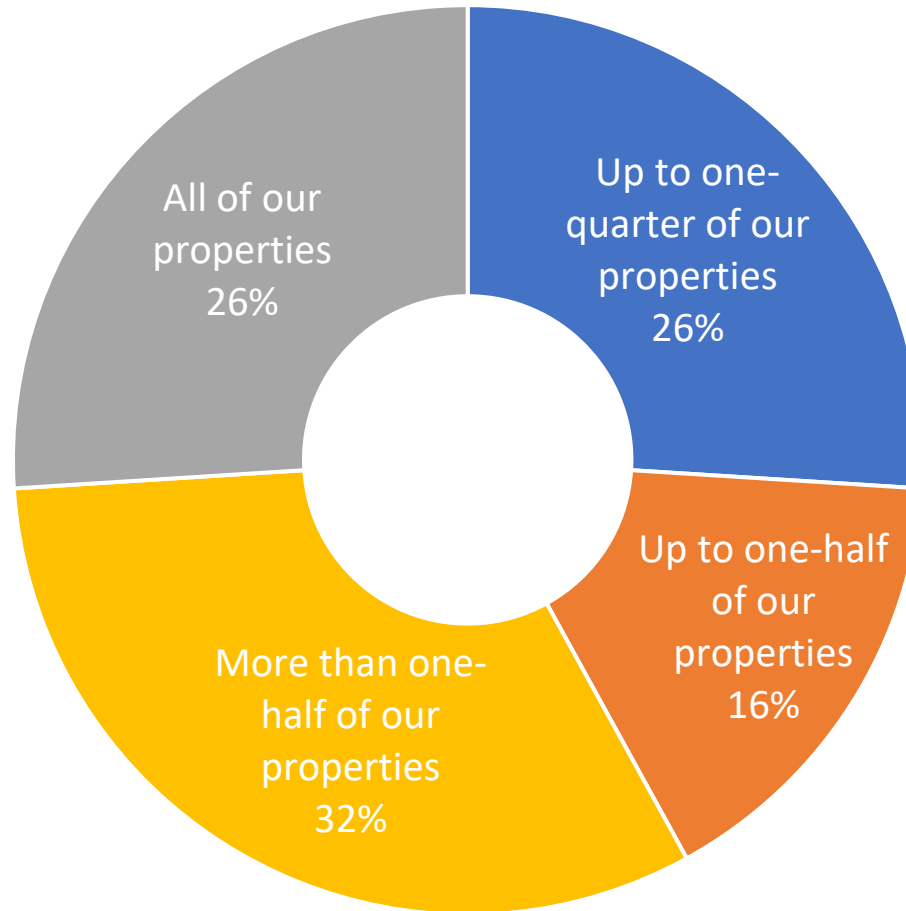
Source: NIC Executive Survey Insights

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



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

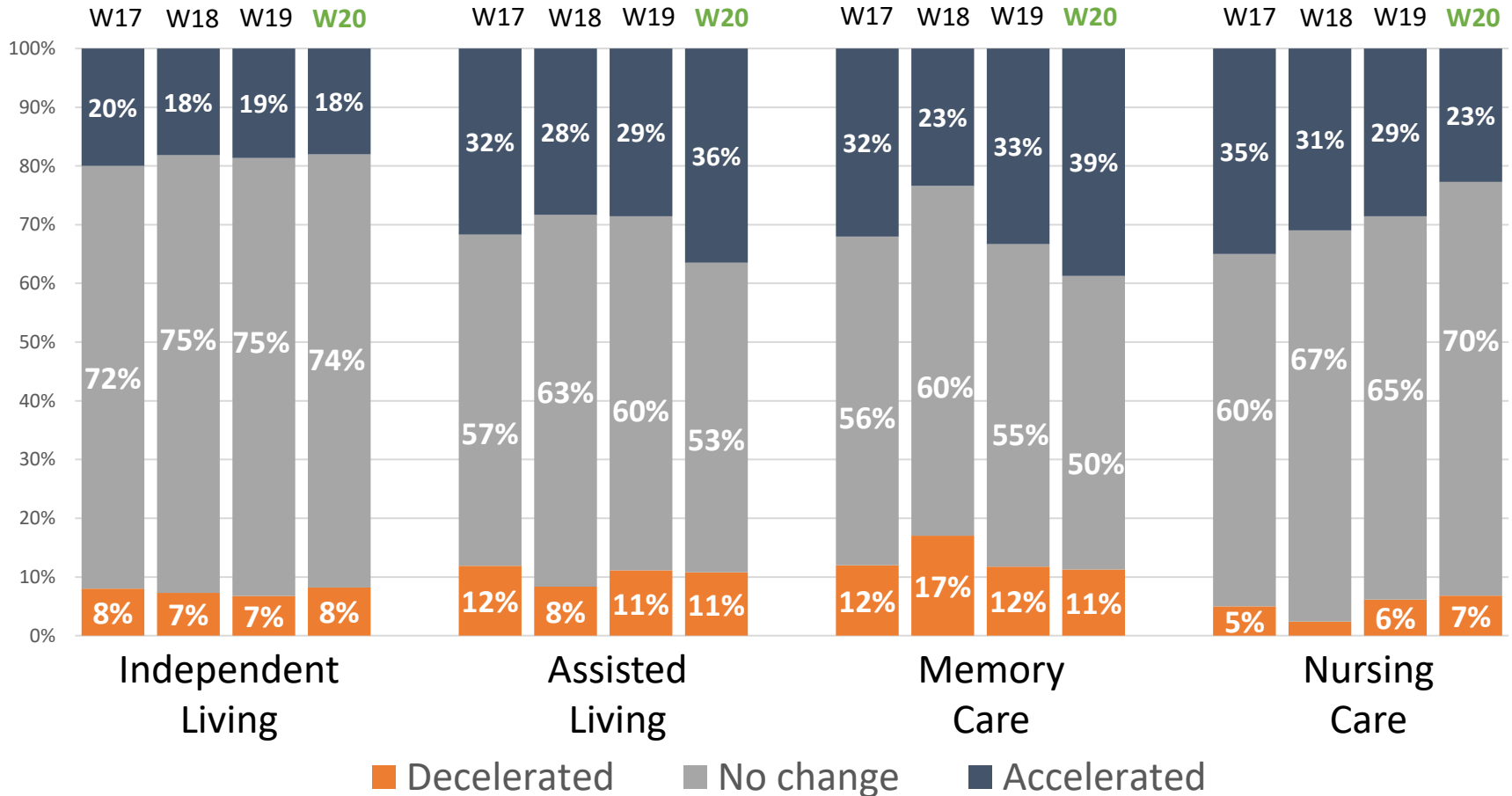
Organizations With Multiple Properties Offering Rent Concessions In...



Source: NIC Executive Survey Insights

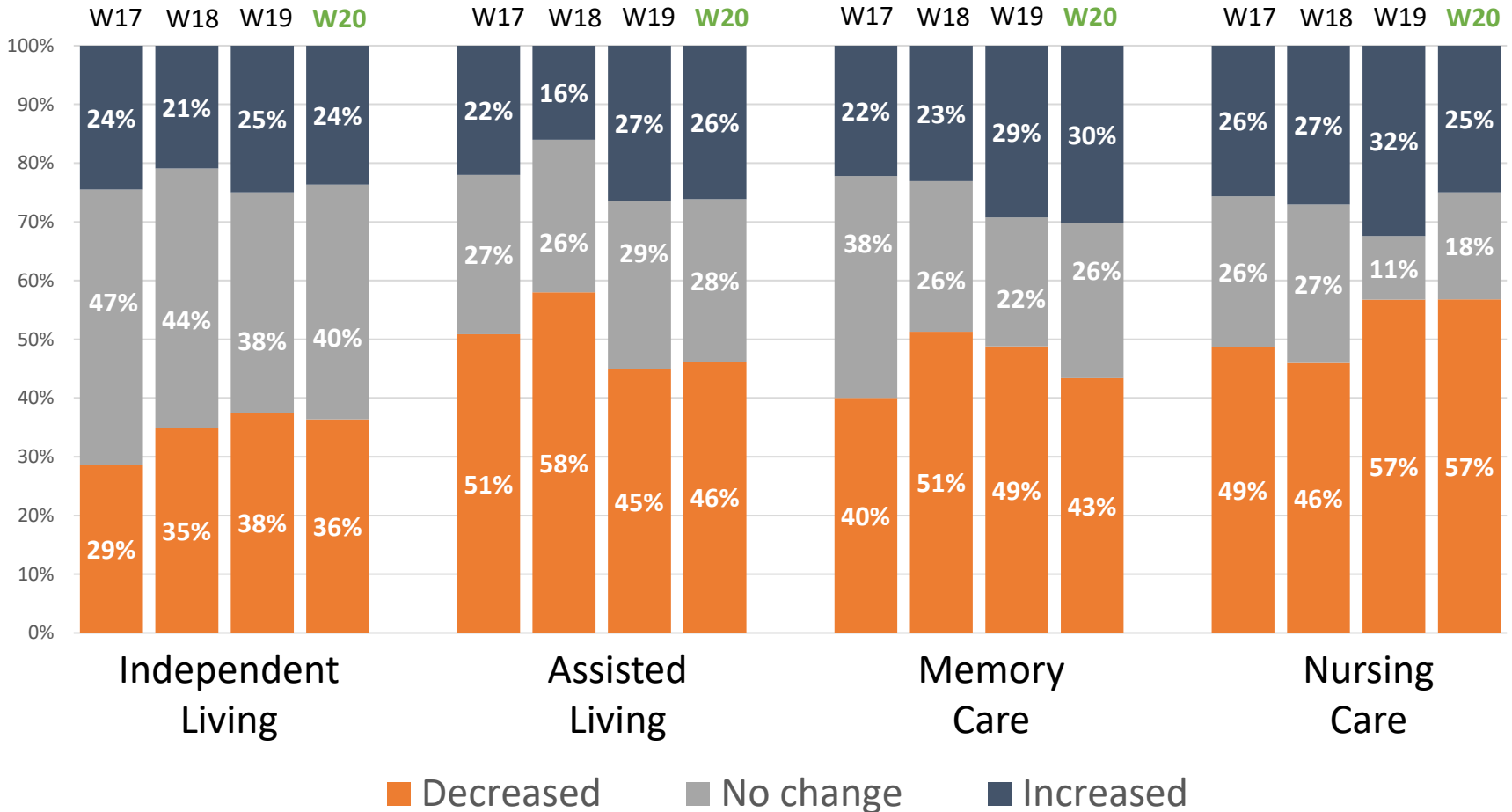
Wave 20 responses collected January 11 to January 24, 2021

Pace of Move-Outs in Past 30-Days



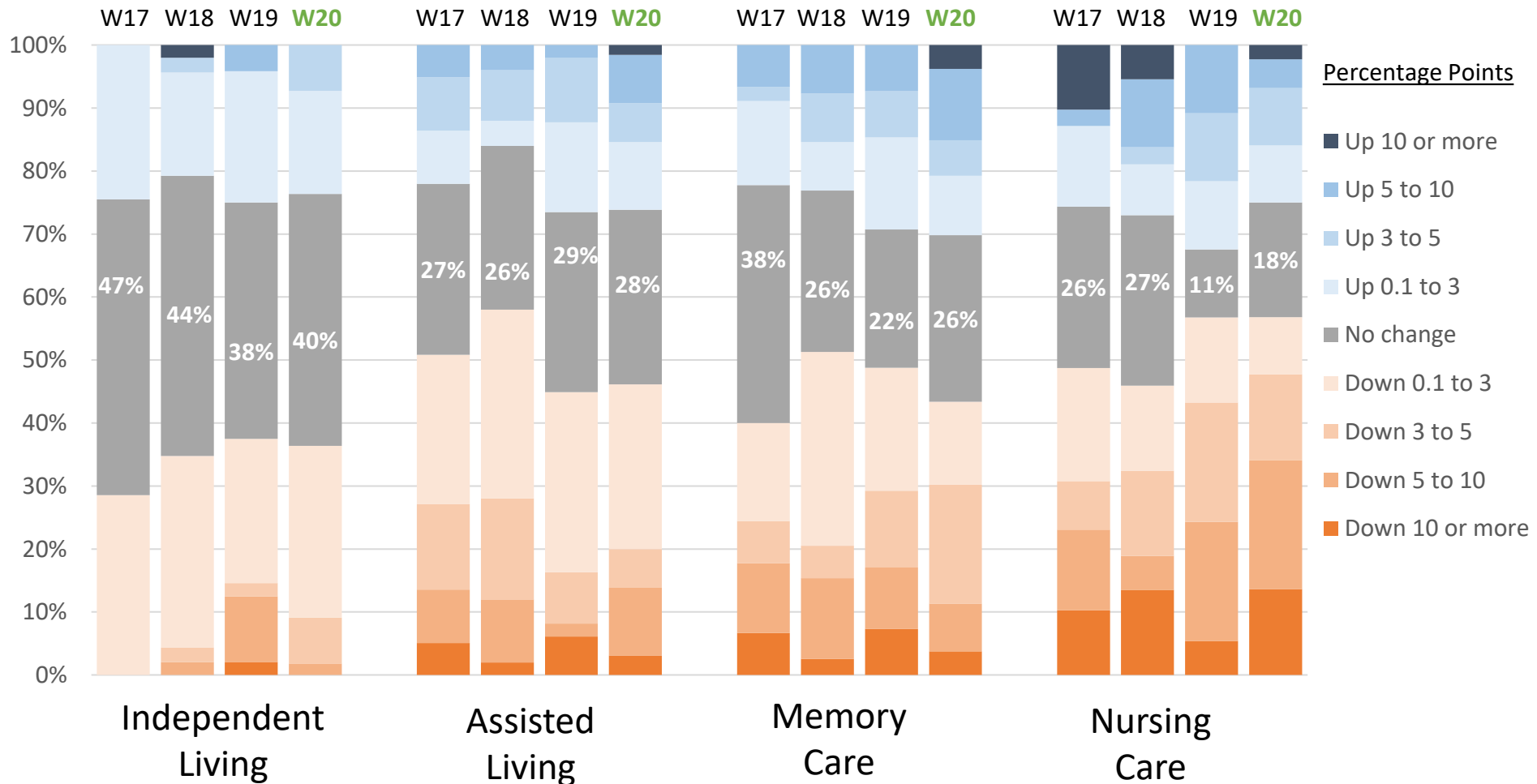
Wave 17 responses collected November 30 to December 13, 2020
 Wave 18 responses collected December 14 to December 27, 2020
 Wave 19 responses collected December 28, 2020 to January 10, 2021
 Wave 20 responses collected January 11 to January 24, 2021
 Totals may not add to 100% due to rounding
 Source: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

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



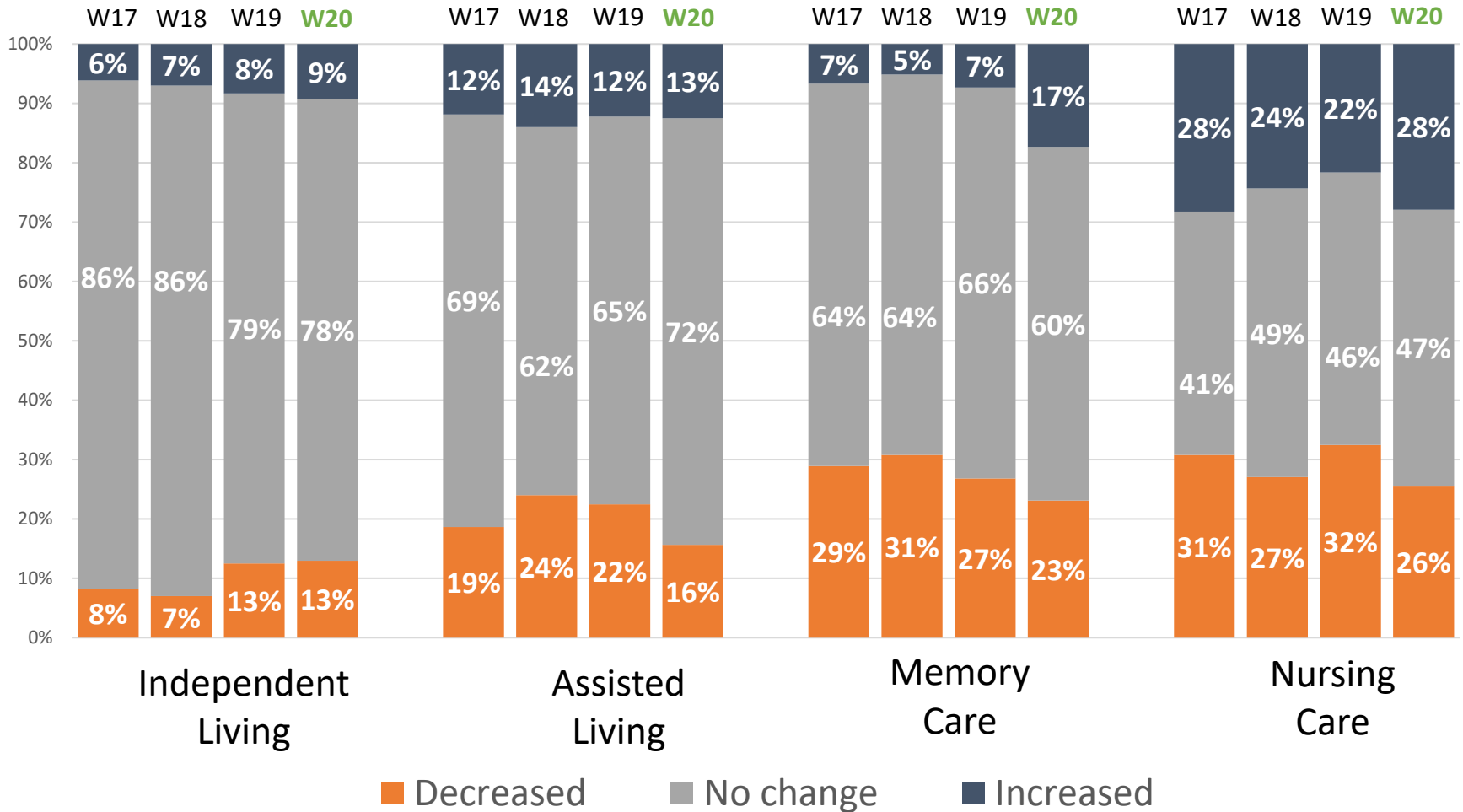
Wave 17 responses collected November 30 to December 13, 2020
 Wave 18 responses collected December 14 to December 27, 2020
 Wave 19 responses collected December 28, 2020 to January 10, 2021
 Wave 20 responses collected January 11 to January 24, 2021
 Totals may not add to 100% due to rounding
 Source: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