Executive Survey Insights
Wave 22
February 8 - 21, 2021

• Report Graphs
Residents and staff who have taken the vaccine (average)

- First Dose:
  - Residents: 84%
  - Staff: 59%

- Second Dose:
  - Residents: 76%
  - Staff: 55%

Source: NIC Executive Survey Insights

Wave 22 responses collected February 8 to February 21, 2021
Share of organizations that has made/will make COVID-19 vaccination mandatory for....

- Staff: 87%
- Residents: 81%
- Neither—it is/will be voluntary: 8%

*Source: NIC Executive Survey Insights*

*Wave 22 responses collected February 8 to February 21, 2021*
Efforts to encourage vaccination acceptance among residents and staff

- Management leadership by example (taking the vaccine), 87%
- Education campaigns for residents/staff, 95%
- One-on-one community leadership support, 79%
- Social media (education, promotion, recognition), 62%
- Education campaigns for family, 51%
- Resident and staff "champions" and influencers, 38%
- Presentations by local health authorities, specialists, pharmacies, etc., 43%
- Non-cash incentives for staff (prizes, drawings, PTO, etc.), 25%
- Financial incentives for staff, 15%

Source: NIC Executive Survey Insights
Wave 22 responses collected February 8 to February 21, 2021
Pace of Move-Ins in Past 30-Days

Wave 19 responses collected December 28, 2020 to January 10, 2021
Wave 20 responses collected January 11 to January 24, 2021
Wave 21 responses collected January 25 to February 7, 2021
Wave 22 responses collected February 8 to February 21, 2021
Totals may not add to 100% due to rounding
Source: NIC Executive Survey Insights
Pace of Move-Ins in Past 30-Days: Assisted Living

March 24 ➔ February 21

Totals may not add to 100% due to rounding

Source: NIC
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Source: NIC Executive Survey Insights
Change in Occupancy by Care Segment: Current vs. One Month Prior

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Totals may not add to 100% due to rounding
Source: NIC Executive Survey Insights
Other, not in report or for reference
Types of properties owned/operated

- **74% Seniors Housing (IL/AL/MC)**
- **31% Nursing Care**
- **28% CCRC**

*(multiple responses allowed, will not add to 100%)*

### Number of Properties Owned/Operated

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### Profit Status

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Organizations Currently Experiencing a Backlog of Residents Waiting to Move In

Source: NIC Executive Survey Insights
Reasons for Acceleration in Move-Ins in Past 30-Days

- Another reason
- Hospital placement
- Increased resident demand

Question was not asked prior to May 11, 2020
Source: NIC Executive Survey Insights
Reasons for Acceleration in Move-Outs in Past 30-Days

- Deaths
- Resident/Family Member Concerns
- Residents Moving to Higher Levels of Care

April 1 to February 21

*Question was not asked prior to April 1, 2020*

*Source: NIC Executive Survey Insights*
Reasons for Deceleration in Move-Ins in Past 30-Days

- Slowdown in Leads Conversions/Sales
- Organization Imposed Ban
- Resident or Family Member Concerns
- Mandatory Government Imposed Ban

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

- **Staff refusal**
  - W22: 87%
  - W21: 81%
  - W20: 80%

- **Vaccination administration logistics**
  - W22: 28%
  - W21: 42%
  - W20: 42%

- **Resident refusal**
  - W22: 33%
  - W21: 29%
  - W20: 30%

- **Not enough doses for all residents who want it**
  - W22: 10%
  - W21: 14%
  - W20: 23%

- **Guardianship approval delays**
  - W22: 5%
  - W21: 10%
  - W20: 14%

- **None of the above**
  - W22: 7%
  - W21: 4%
  - W20: 11%

- **Another reason**
  - W22: 10%
  - W21: 10%
  - W20: 9%

- **Not enough doses for all staff who want it**
  - W22: 3%
  - W21: 7%
  - W20: 5%

**Source:** NIC Executive Survey Insights

Wave 20 responses collected January 11 to January 24, 2021
Wave 21 responses collected January 25 to February 7, 2021
Wave 22 responses collected February 8 to February 21, 2021
Organizations Offering Rent Concessions

Source: NIC Executive Survey Insights
Average (most recent) occupancy in organizations offering or not offering rent concessions

- Offering rent concessions
- Not offering rent concessions

Source: NIC Executive Survey Insights
Wave 22 responses collected February 8 to February 21, 2021

Note: Average occupancy includes organizations with properties still in lease-up
Share of organizations that have seen a notable increase in prospect interest specifically due to the availability of the vaccine

Source: NIC Executive Survey Insights
Wave 22 responses collected February 8 to February 21, 2021
Expect residents to be fully vaccinated with both doses within...

Source: NIC Executive Survey Insights
Wave 22 responses collected February 8 to February 21, 2021
Organizations received the vaccine

100%

- **First Dose**: 87%
- **Second Dose**: Yes

Source: NIC Executive Survey Insights

Wave 22 responses collected February 8 to February 21, 2021
Multiple property organizations received the vaccine in...

Source: NIC Executive Survey Insights
Wave 22 responses collected February 8 to February 21, 2021
I think mandatory staff vaccination is the right decision long term. We will lose some staff, probably less than 7%.

Answers within regarding vaccine are provided for service levels that are allocated vaccine (to date, Skilled nursing and Assisted living); independent living residents are currently being directed to vaccination sites in order to receive vaccine.

I left some questions blank as I completed them on a previous survey. The big question we are being asked is when we will reopen for visits and what will that look like. Are communities requiring volunteers to be vaccinated before they can volunteer, similar to how the schools worked for other vaccines? What about families? We aren’t requiring our own staff to get the vaccine so I’m not sure requiring volunteers to have it, or any other outside health care providers will work. Just curious too when the results of the NIC survey will be provided. Thank you. Pam Ferris

We need to open facilities as soon as possible for families and residents. We are seeing a decline in our residents due to depression and loneliness.

Positive news reporting has reduced adult children concern about Covid spread in congregate settings. Thus inquiries and move-ins are commencing to improve.
Executive Insights Survey Dates and Response Counts

- ESI Market Fundamentals
- ESI COVID-19

March 24 — February 21