

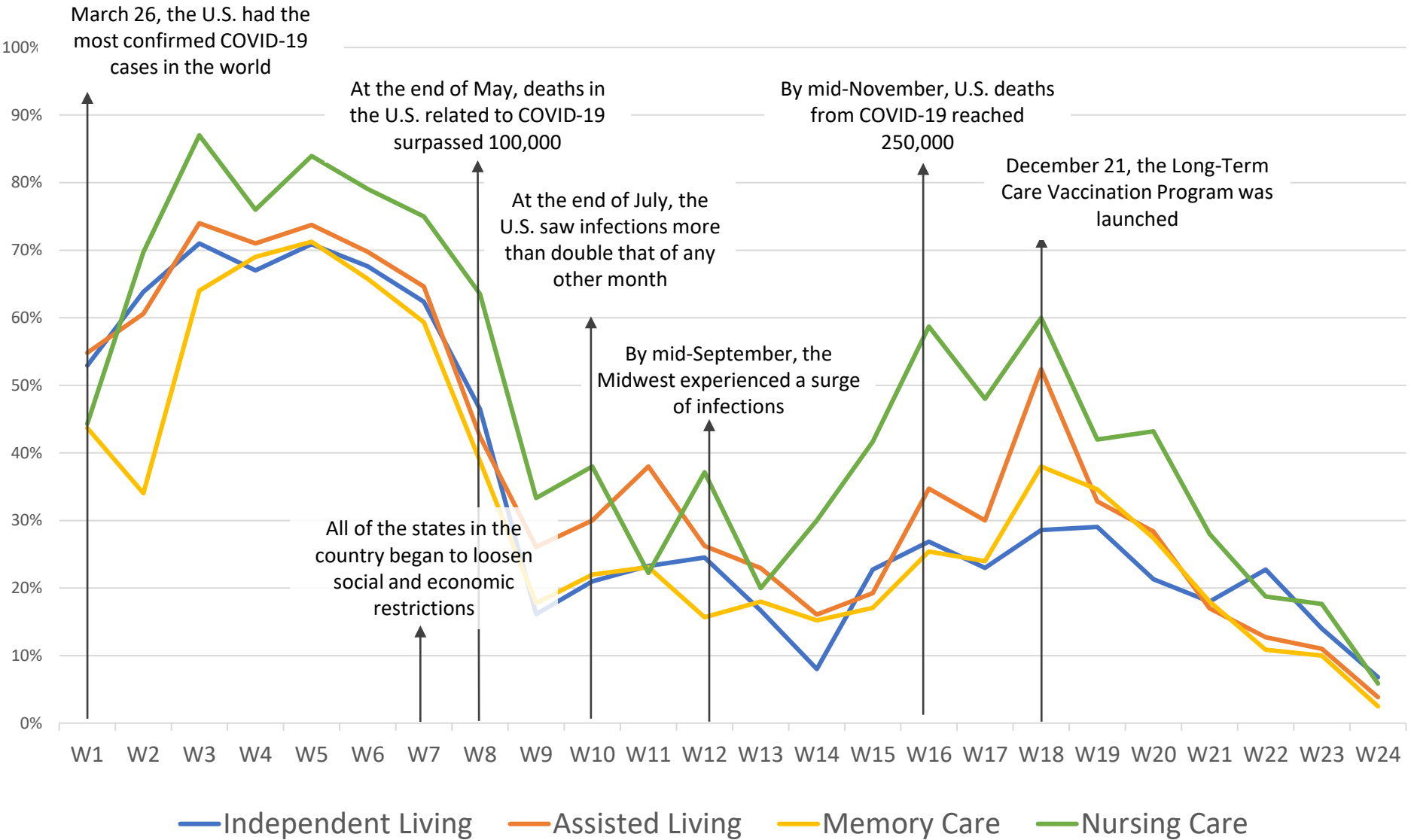
# Executive Survey Insights

## Wave 24

### March 8-21, 2021

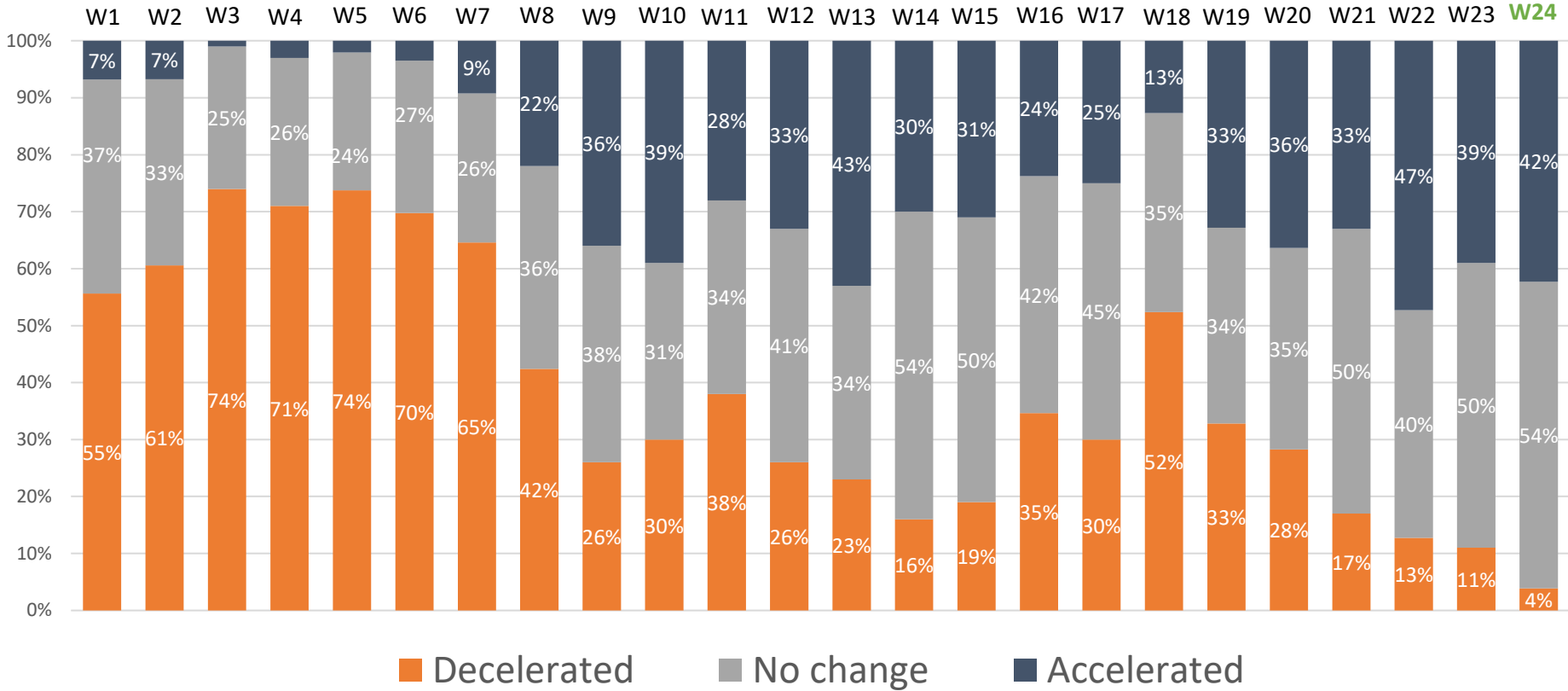
- Report Graphs

# Share of organizations that reported deceleration in the pace of move-ins (March 24, 2020 through March 21, 2021)



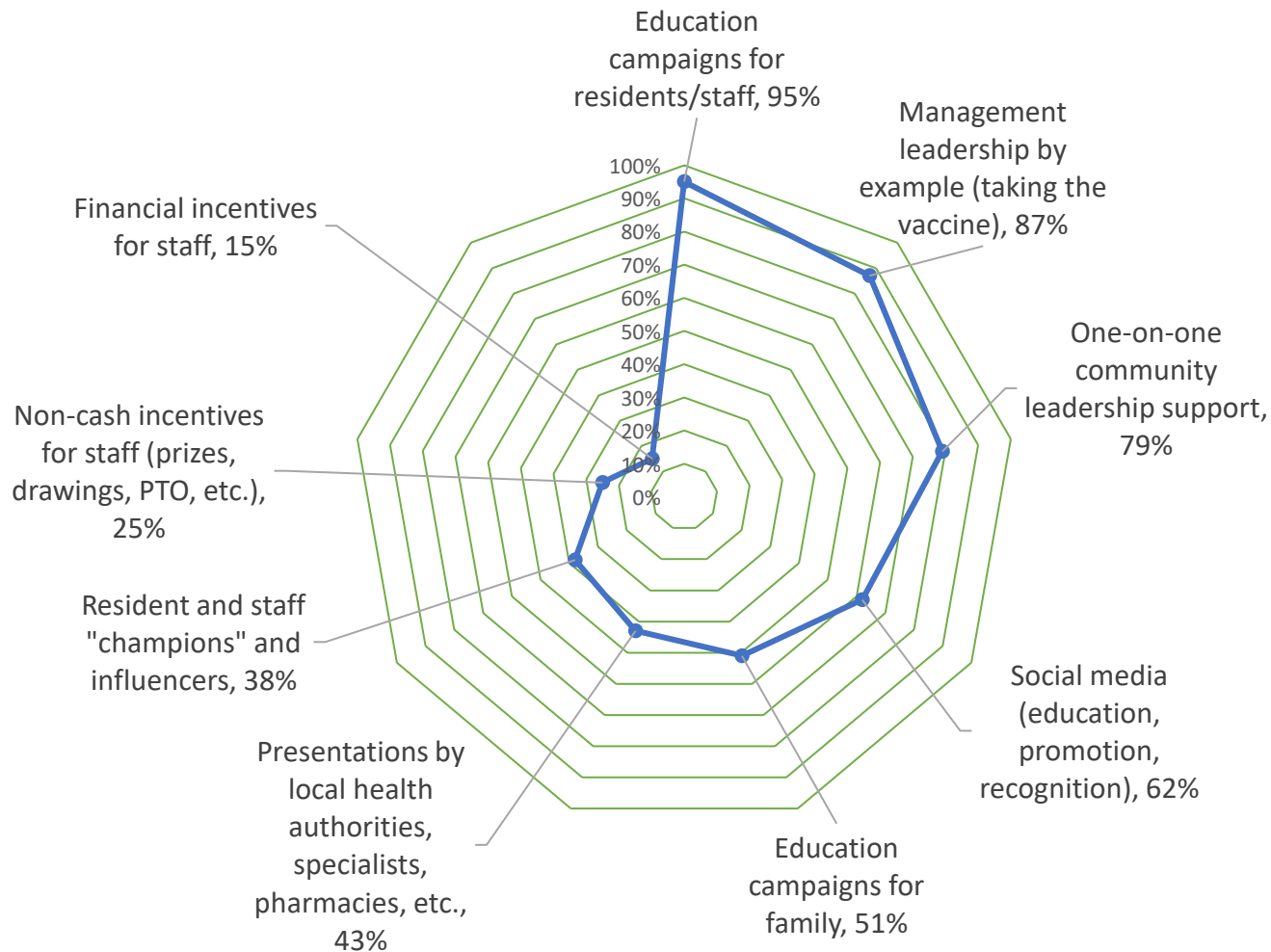
Source: NIC Executive Survey Insights

## Pace of Move-Ins in Past 30-Days: Assisted Living



Totals may not add to 100% due to rounding  
 Source: NIC

## Efforts to encourage vaccination acceptance among residents and staff



Source: NIC Executive Survey Insights

Wave 22 responses collected February 8 to February 21, 2021

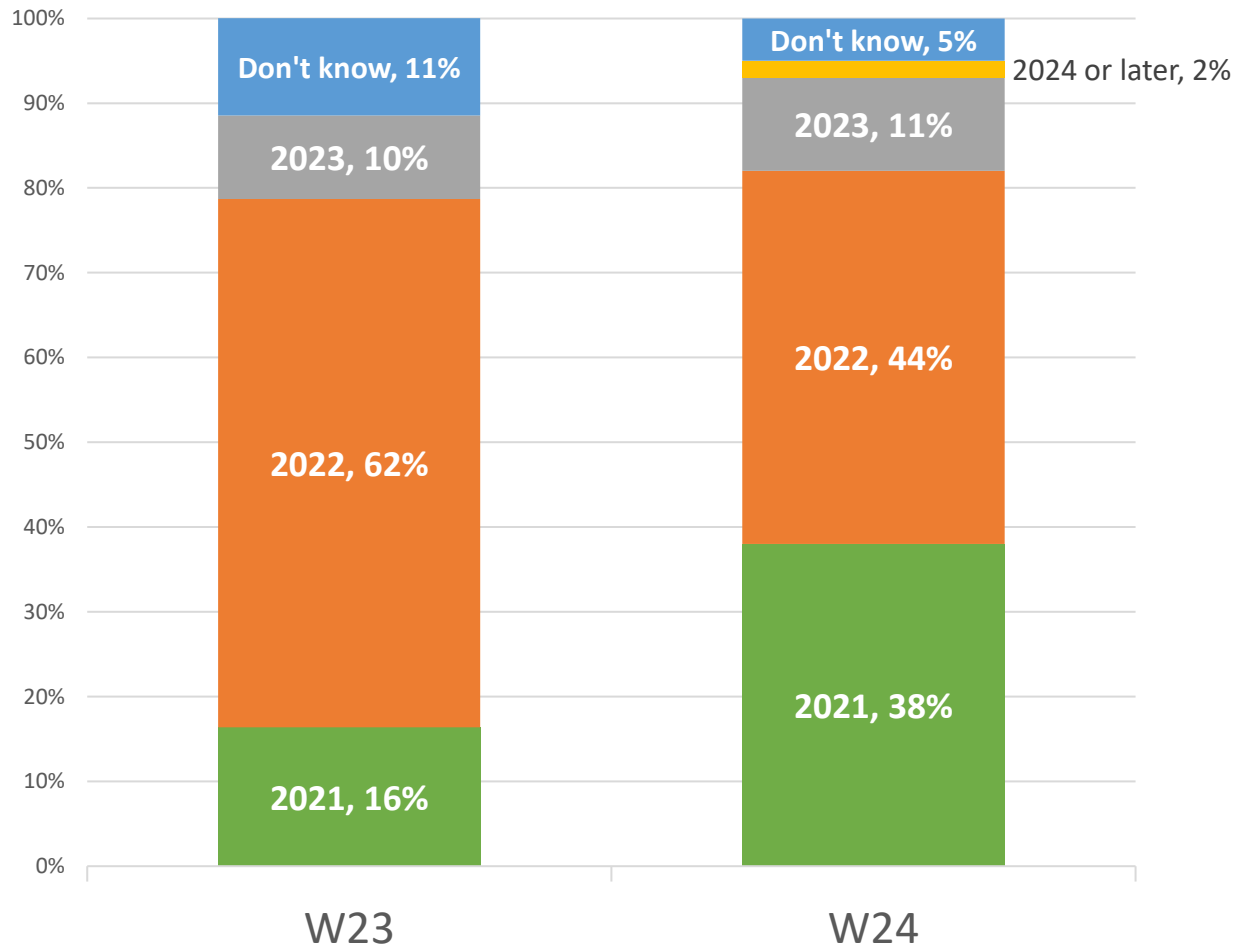
# Organizations will....

Keep doing	Further develop	Bring back	Stop doing
1-on-1 resident visits by activities staff	Acquisitions	Census development	Scheduled visitation
Any form of visitation with families	Admissions	Communal activities	As much personal outreach
Building independent living units	Air filtration/disinfection systems	Congregate dining	Buffet lines, salad bar
Building relationships with referral sources	Automation	Dining	Crowded activities
Cleaning protocols	Digital/social media campaigns	Dining at 50% capacity	Designated COVID-19 unit
Connecting through technology	Efficiencies in food & beverage	Guest dining	Free room service
COVID-19 Safety Protocols	Employee stabilization	Dining rooms	Furloughing staff
Education sessions	Employee engagement	Expansion of ILU	Health screens at the door
Enhanced cleaning protocols	Financial management tools	Family events	Isolation of residents
Enhanced communication efforts	Group gatherings	Family visits	Large marketing events
Flexible work locations	In-room services	Full community tours	Lockdowns
Employee engagement	Infection control efforts	Group activities/engagement	Meal delivery
Fitness classes via zoom	Infection control training and protocols	Group events	Pausing group activities
Following all COVID-19 compliance	Investment in technology	In-person meetings	Paying hero pay
Health screening	Marketing	Massage services	Reduce healthcare beds
Independent living rental new construction	Masking for unvaccinated staff	Networking with decisionmakers	Restricting family indoor visits
Increased digital marketing	New financial models for admissions/stabilization	On campus tours	Skilled nursing
Increased expense tracking	New lifestyle management programs	Outings	Testing so frequently
Increased sanitization/infection control	Non-facility-based services	Permit in apartment visitation	Testing twice a week
Limiting visitors	Policy and education	Personal outreach	Zoom visits
Virtual visits	Program development	Resident/employee gatherings/parties	
Recruiting new staff	Re-branding	Visitation	
Regular nursing	Remote visitation		
Safety checks for everyone	Social media		
Social distancing	Specialized visitation areas		
Staff/visitor screening for COVID-19 symptoms	Technology		
Staggered dining	Technology for entertainment		
Traditional marketing /media	Vaccinations		
Vaccinations	Virtual activities for residents and prospects		
Virtual marketing and marketing events	Virtual marketing events/tours		
Virtual meetings/streaming programs	Visitation		
Wearing masks	Working with state/local depts of public health		

Source: NIC Executive Survey Insights  
Wave 23 responses collected February 22 to March 7, 2021

Data includes multiple, identical responses. Only one mention shown.

## Occupancy expected to return to pre-pandemic levels

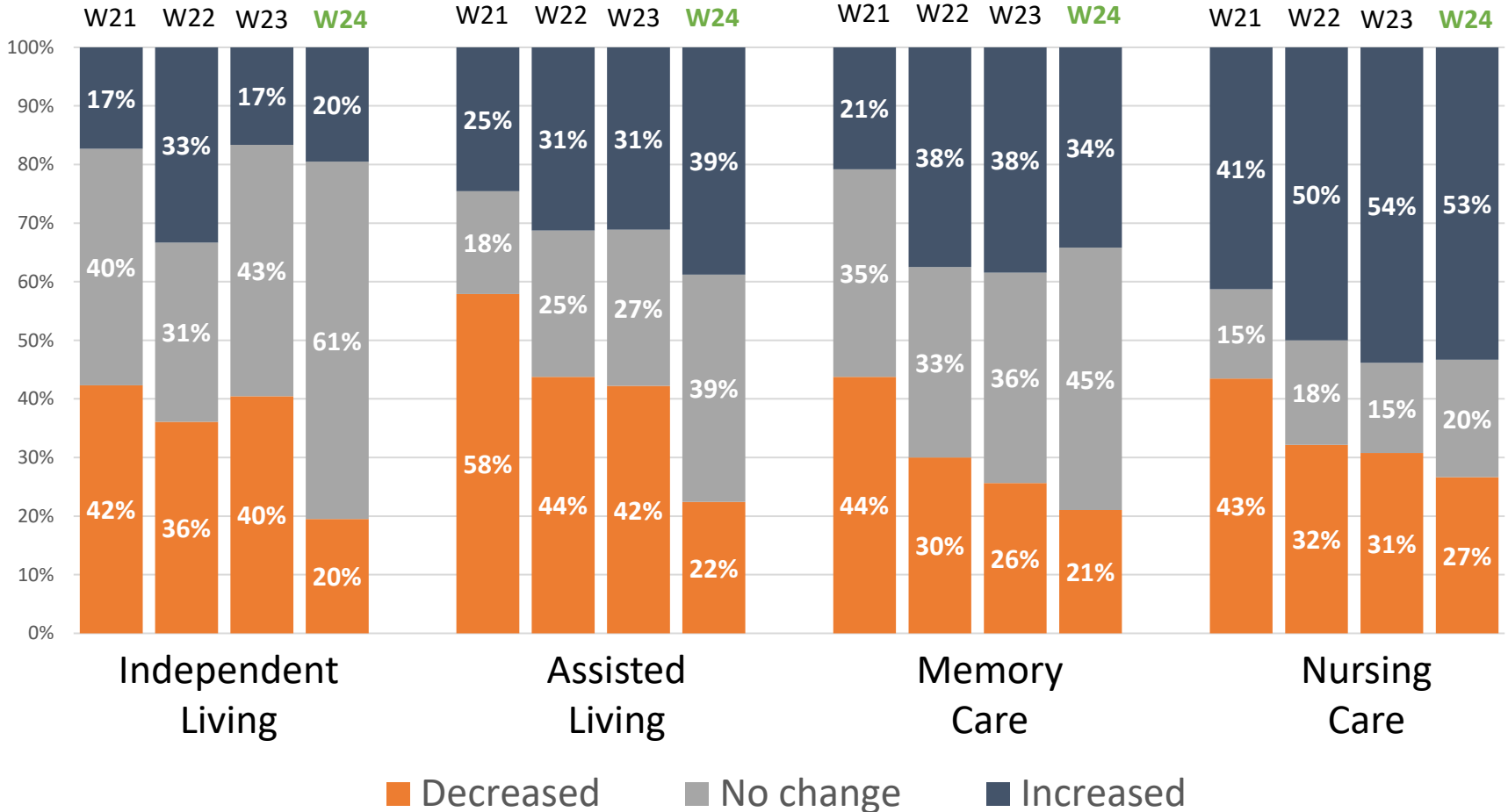


Wave 23 responses collected February 22 to March 7, 2021

Wave 24 responses collected March 8 to March 21, 2021

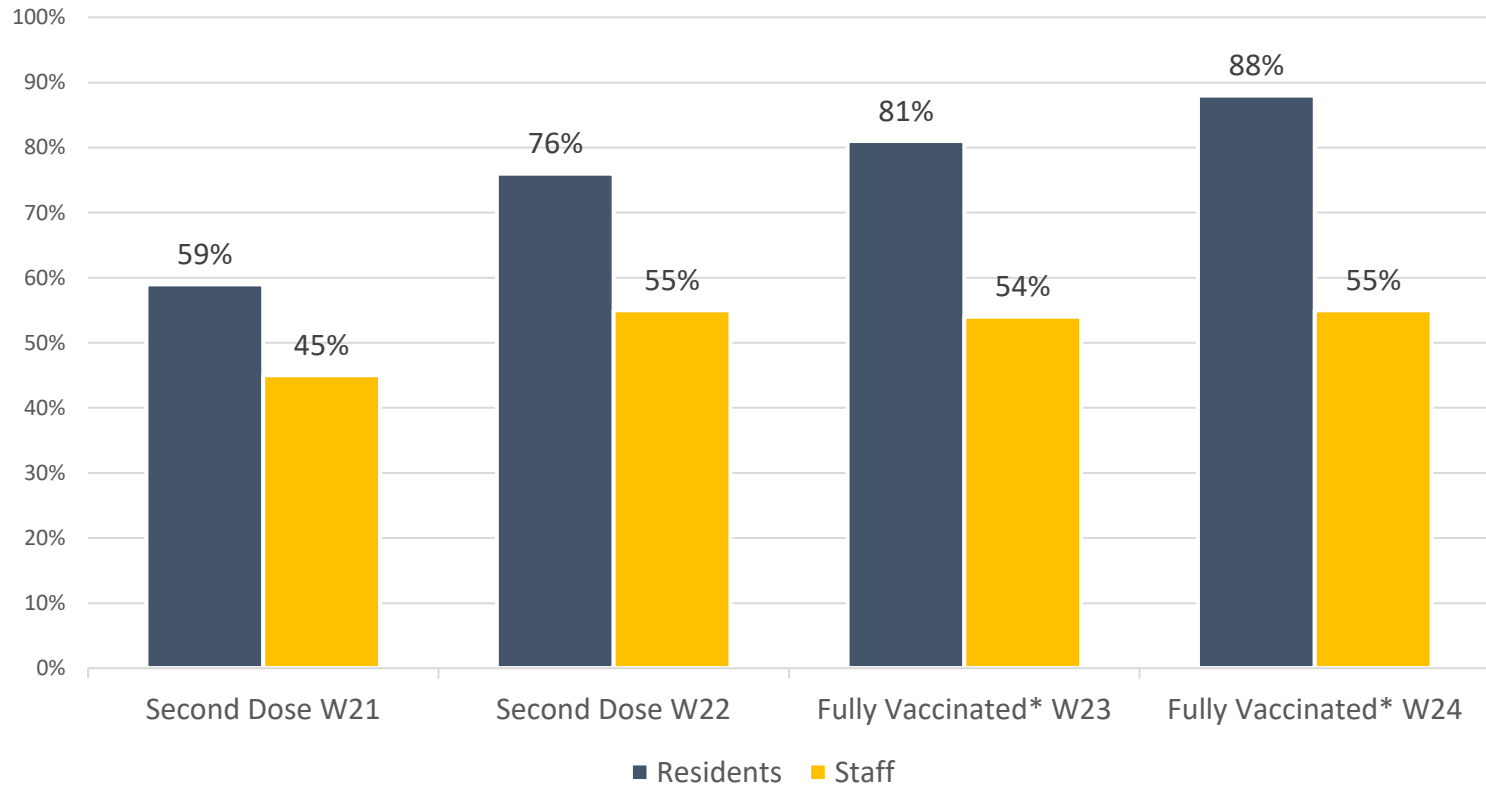
Source: NIC Executive Survey Insights

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



Wave 21 responses collected January 25 to February 7, 2021  
 Wave 22 responses collected February 8 to February 21, 2021  
 Wave 23 responses collected February 22 to March 7, 2021  
 Wave 24 responses collected March 8 to March 21, 2021  
 Totals may not add to 100% due to rounding  
 Source: NIC Executive Survey Insights

## Residents and staff received the vaccine (average)



*\*Question worded: "The share of my organization's residents and staff who have been FULLY vaccinated with the COVID-19 vaccine is..."*

*Wave 21 responses collected January 25 to February 7, 2021*

*Wave 22 responses collected February 8 to February 21, 2021*

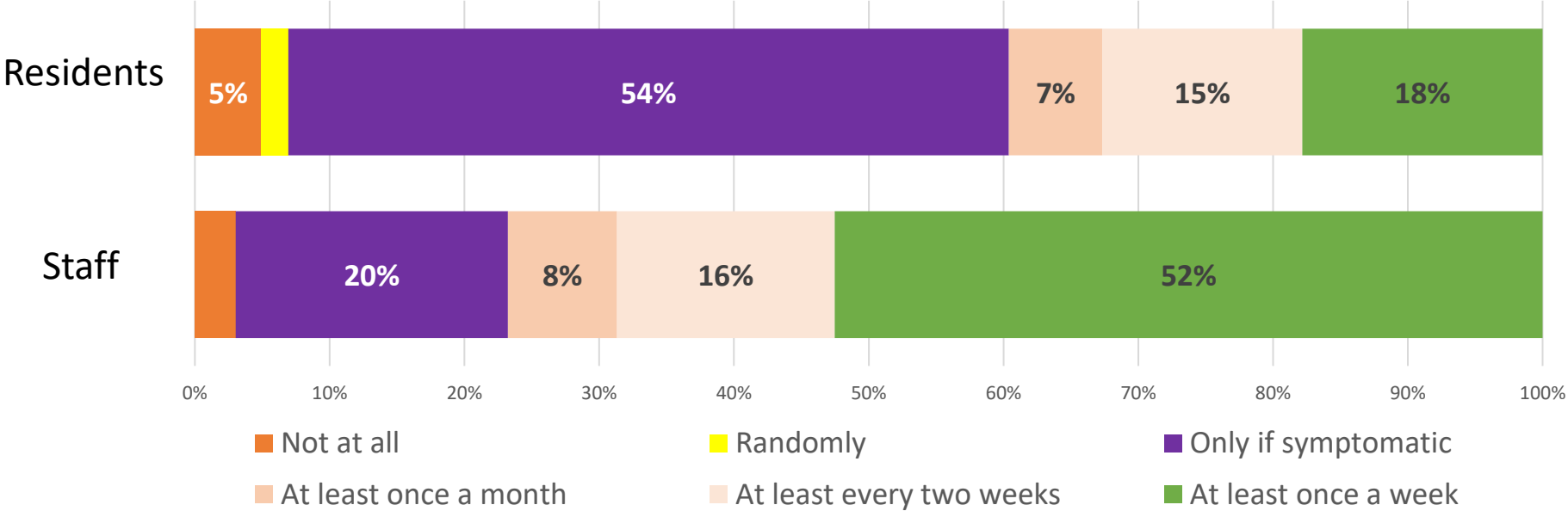
*Wave 23 responses collected February 22 to March 7, 2021*

*Wave 24 responses collected March 8 to March 21, 2021*

*Source: NIC Executive Survey Insights*



### Wave 24: Organizations testing staff and residents as often as...



Wave 24 responses collected March 8 to March 21, 2021

Source: NIC Executive Survey Insights