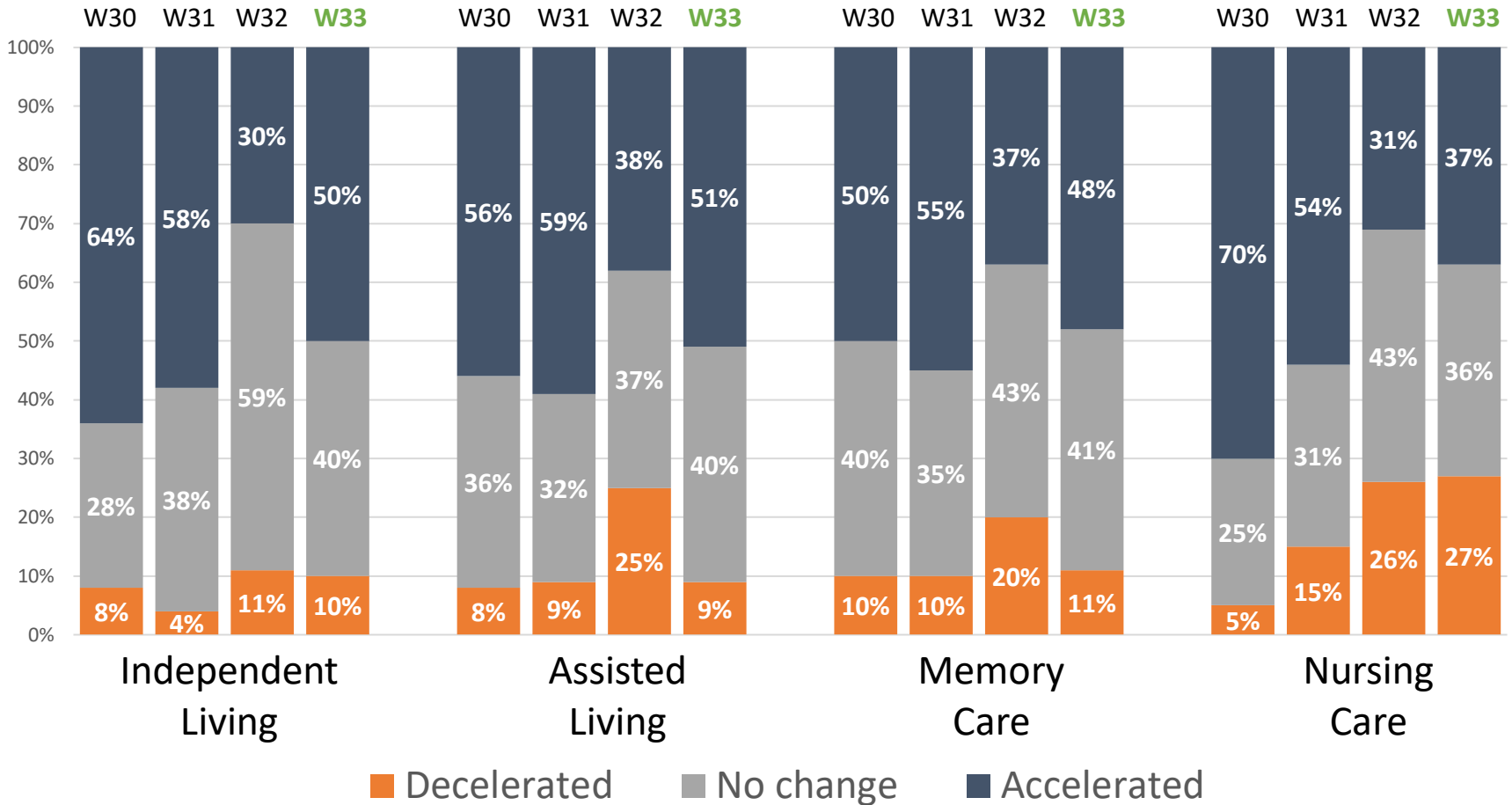


Executive Survey Insights Wave 33 September 7 – October 3, 2021

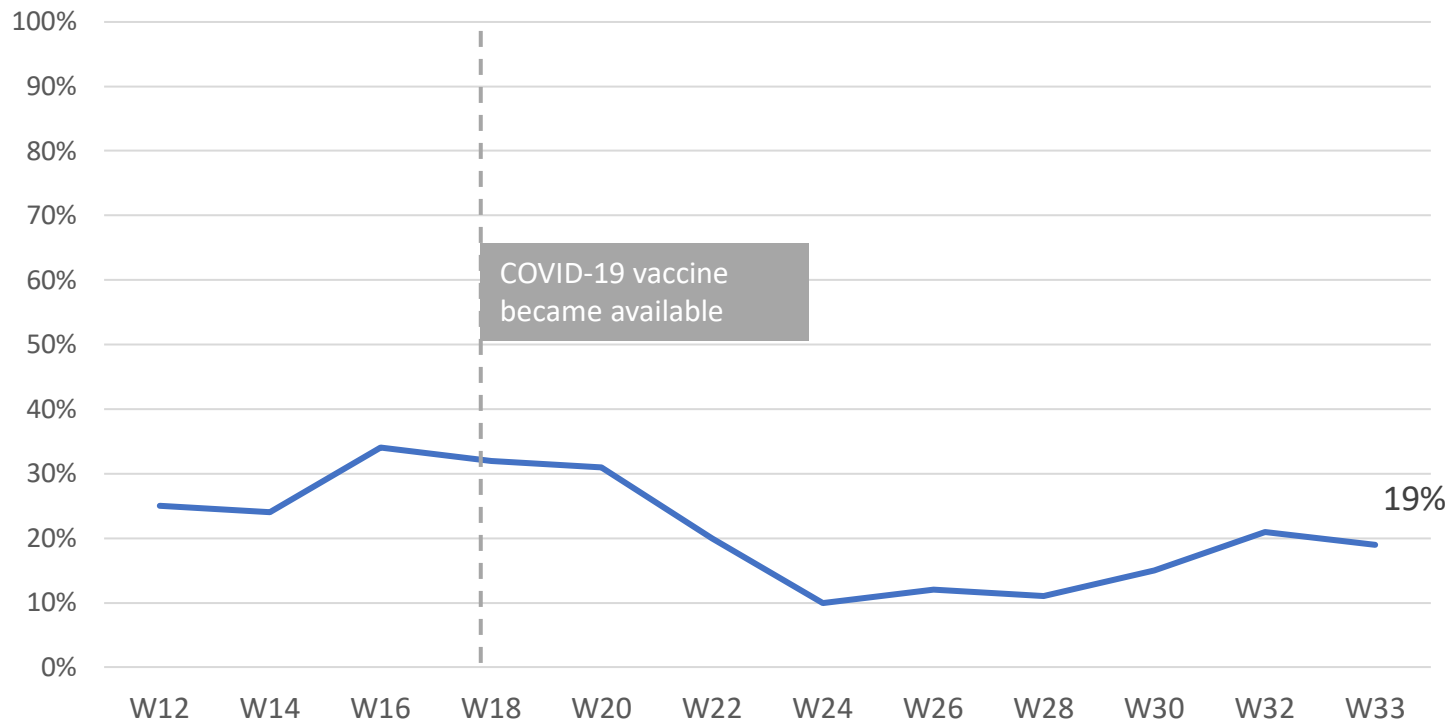
- Report Graphs

Pace of Move-Ins in Past 30-Days



Wave 30 responses collected June 14 to July 11, 2021
 Wave 31 responses collected July 12 to August 8, 2021
 Wave 32 responses collected August 9 to September 6, 2021
 Wave 33 responses collected September 7 to October 3, 2021
 Source: NIC Executive Survey Insights

Organizations currently experiencing a backlog of residents waiting to move in

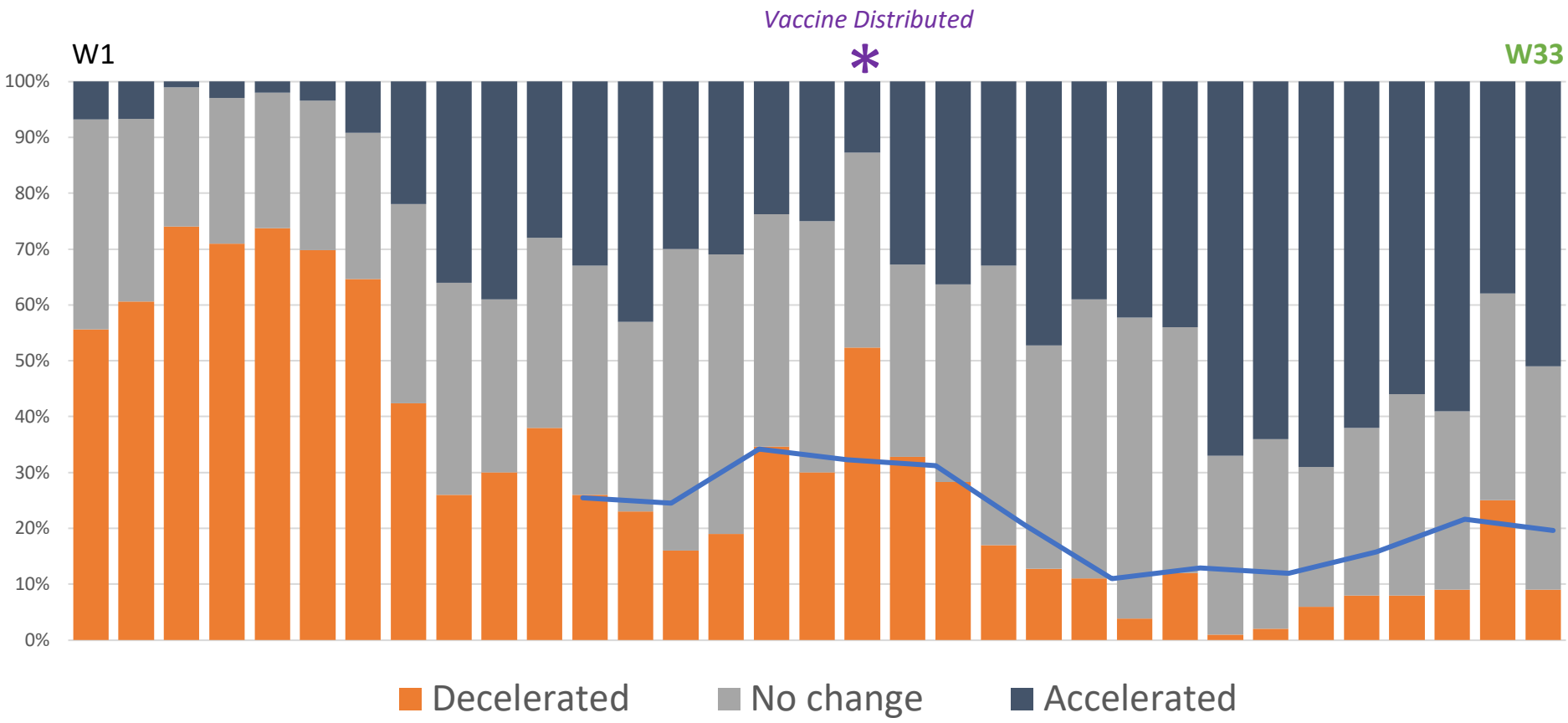


September 15, 2020

October 3, 2021

Source: NIC Executive Survey Insights

Assisted Living Pace of Move-Ins Past 30-Days

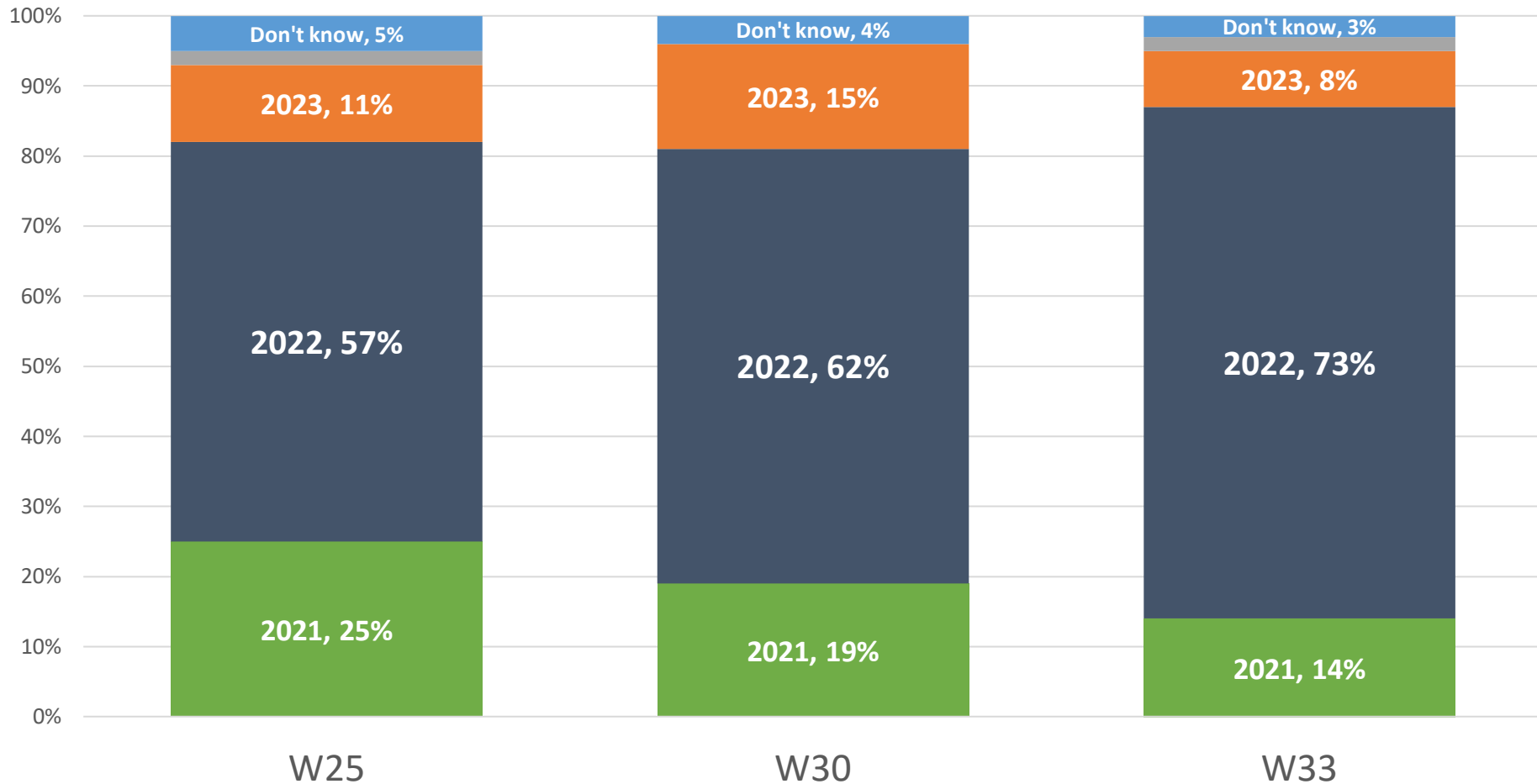


March 24, 2020 October 3, 2021

*Vaccine distributed in W18 (December 20, 2020)
Source: NIC Executive Survey Insights

The blue line illustrates share of organizations that reported a backlog of residents waiting to move in

Occupancy expected to return to pre-pandemic levels:



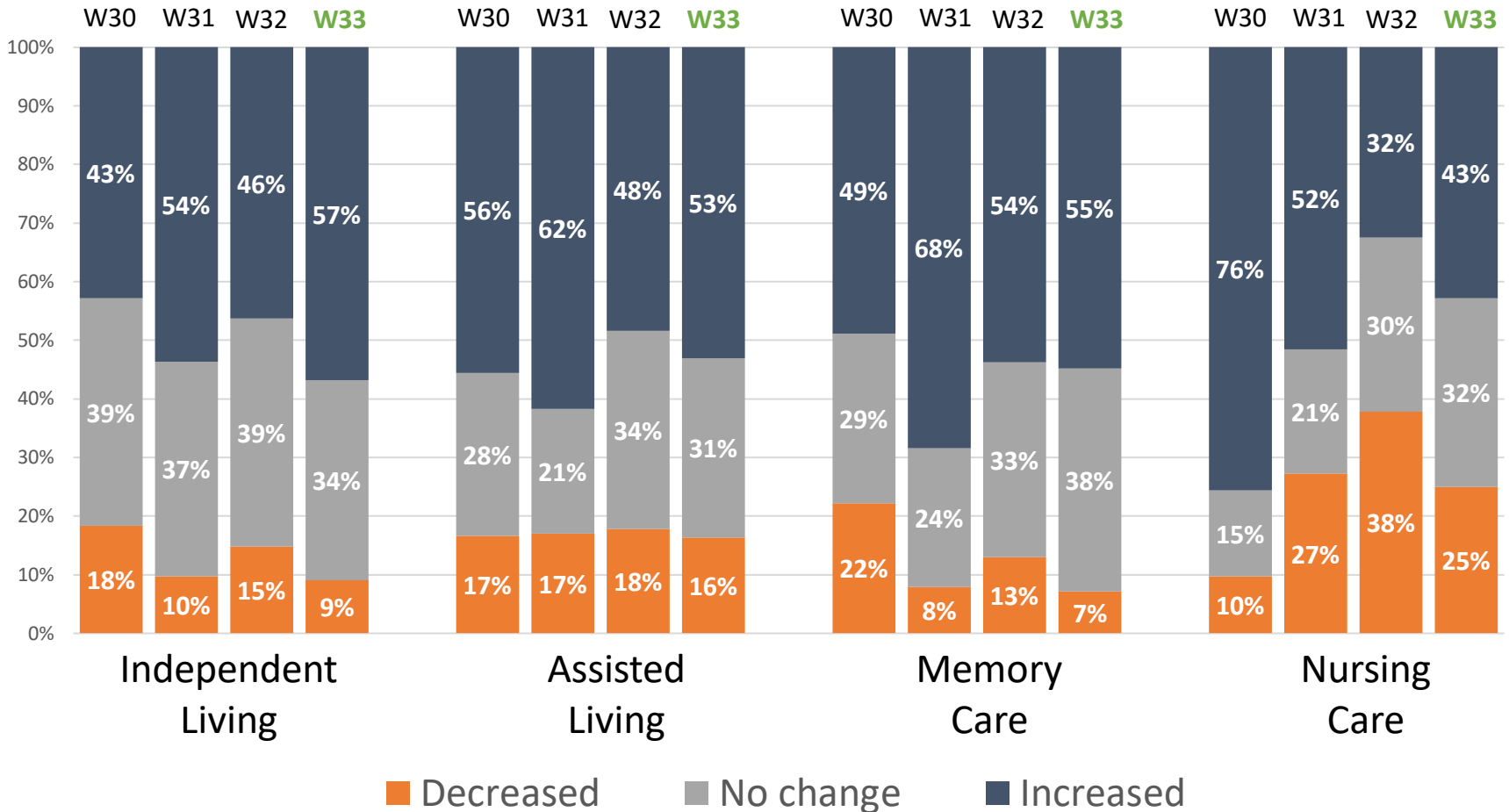
Wave 25 responses collected March 22 to April 4, 2021

Wave 30 responses collected June 14 to July 11, 2021

Wave 33 responses collected September 7 to October 3, 2021

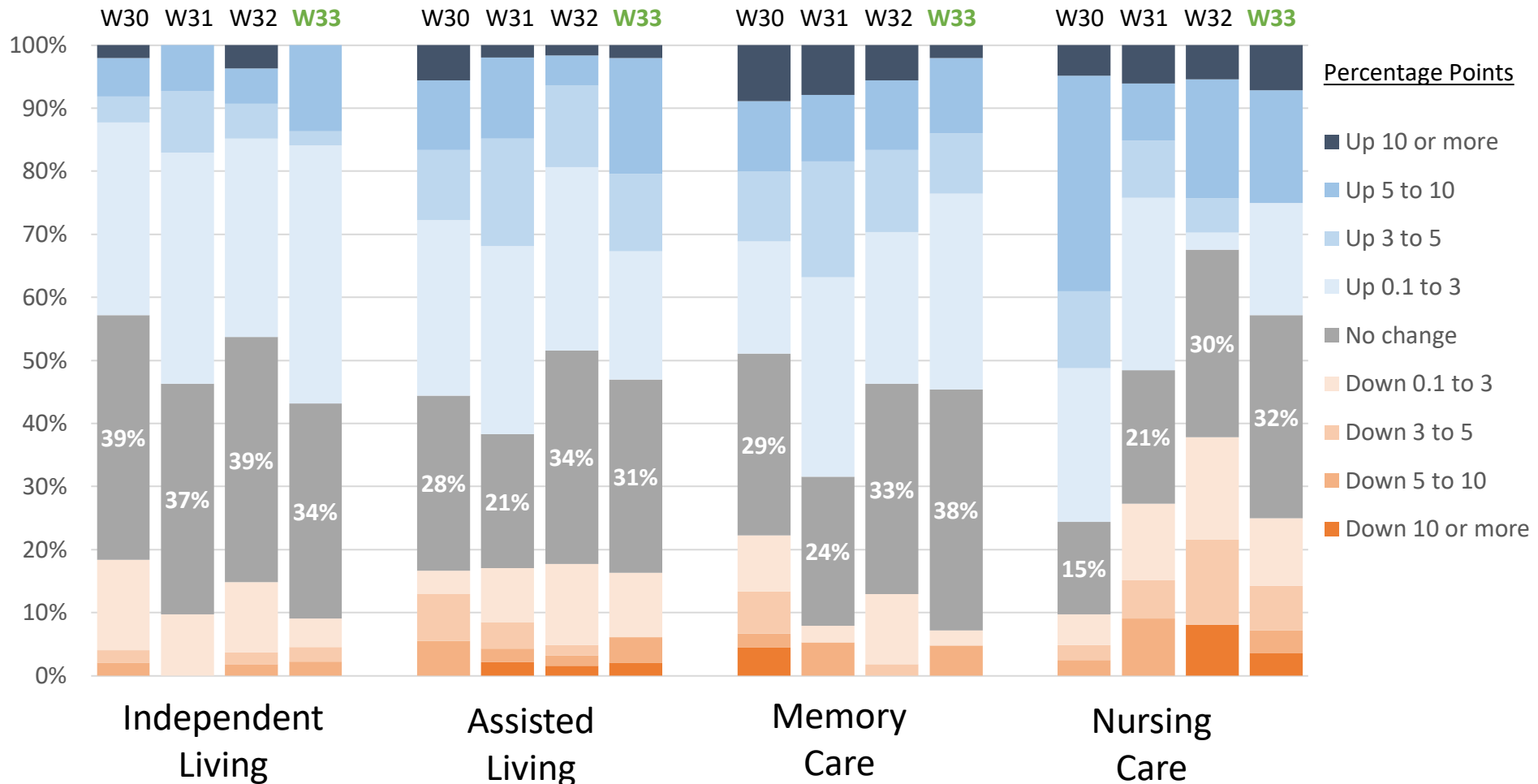
Source: NIC Executive Survey Insights

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



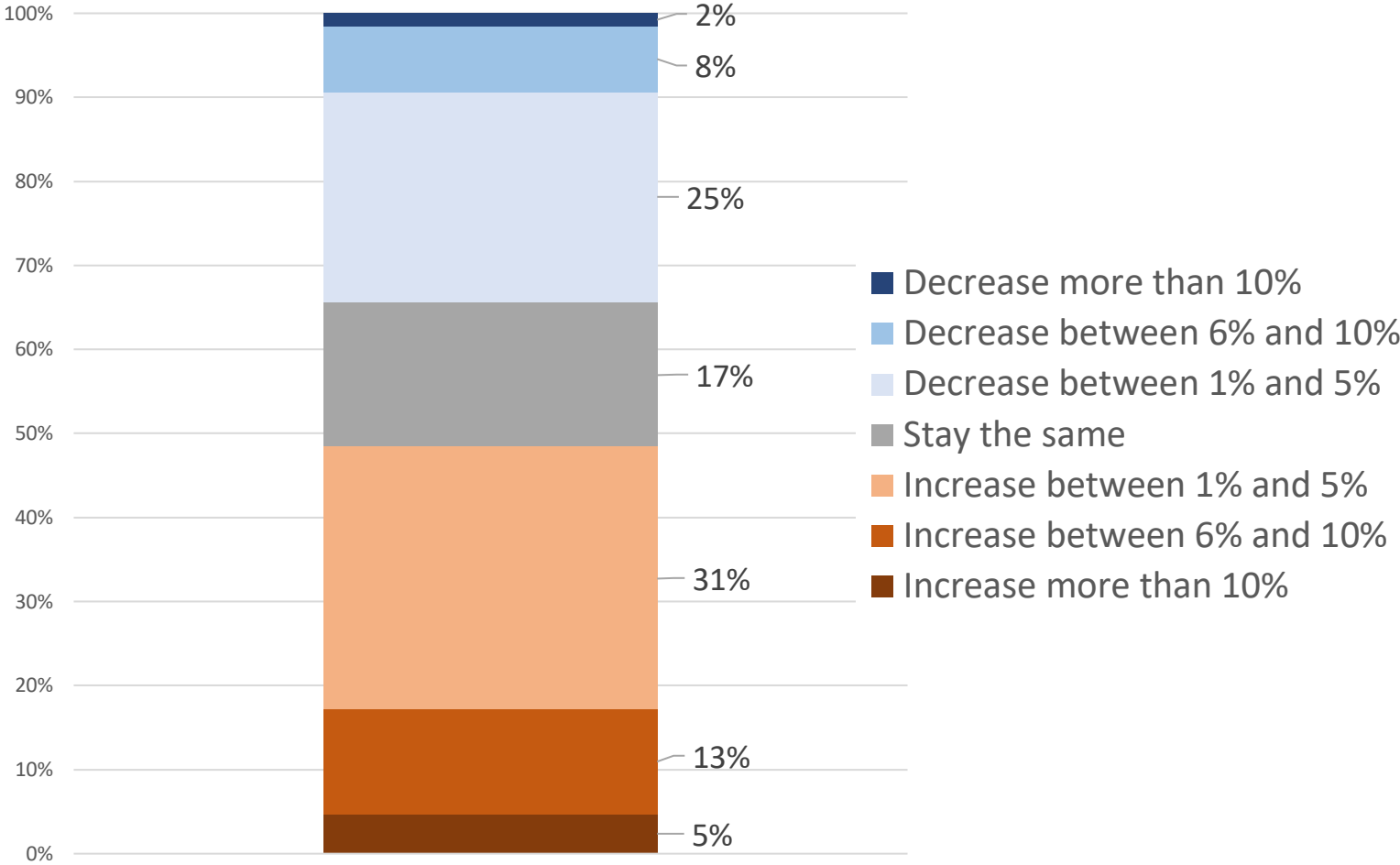
Wave 30 responses collected June 14 to July 11, 2021
 Wave 31 responses collected July 12 to August 8, 2021
 Wave 32 responses collected August 9 to September 6, 2021
 Wave 33 responses collected September 7 to October 3, 2021
 Source: NIC Executive Survey Insights

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



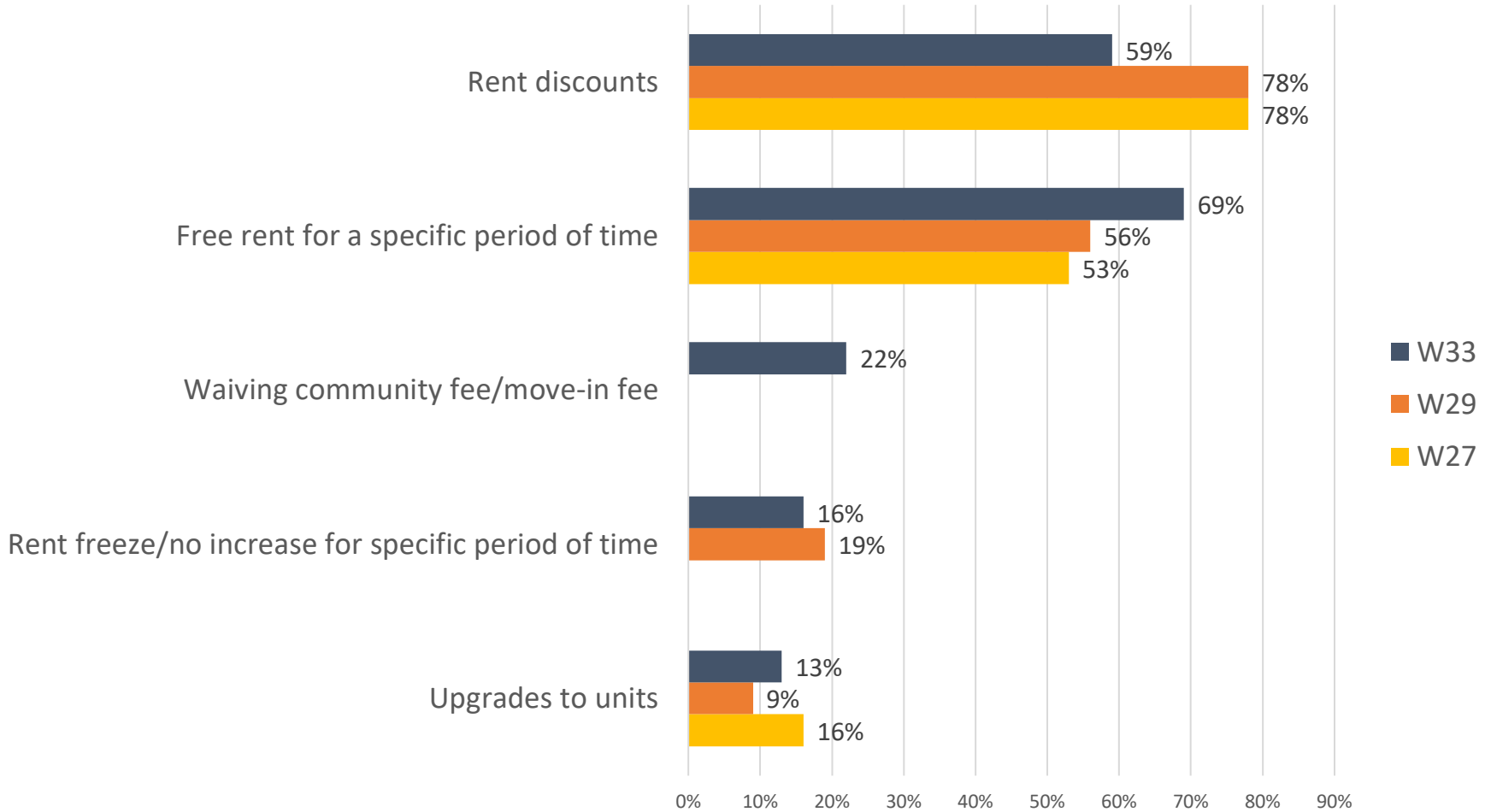
Wave 30 responses collected June 14 to July 11, 2021
 Wave 31 responses collected July 12 to August 8, 2021
 Wave 32 responses collected August 9 to September 6, 2021
 Wave 33 responses collected September 7 to October 3, 2021
 Source: NIC Executive Survey Insights

In the next six months, my organization expects operating margins to...



Wave 33 responses collected September 7 to October 3, 2021
Source: NIC Executive Survey Insights

Rent concessions being offered by organizations



Wave 27 responses collected April 19 to May 2, 2021

Wave 29 responses collected May 17 to June 13, 2021

Wave 33 responses collected September 7 to October 3, 2021

Source: NIC Executive Survey Insights