

Executive Survey Insights

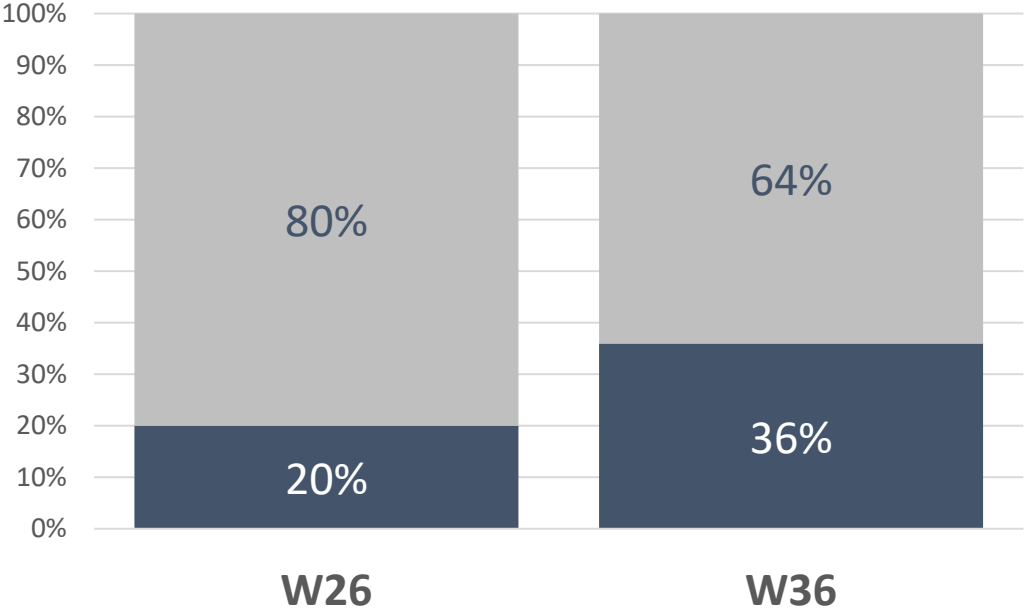
Wave 35

November 8 – December 5, 2021

- Report Graphs

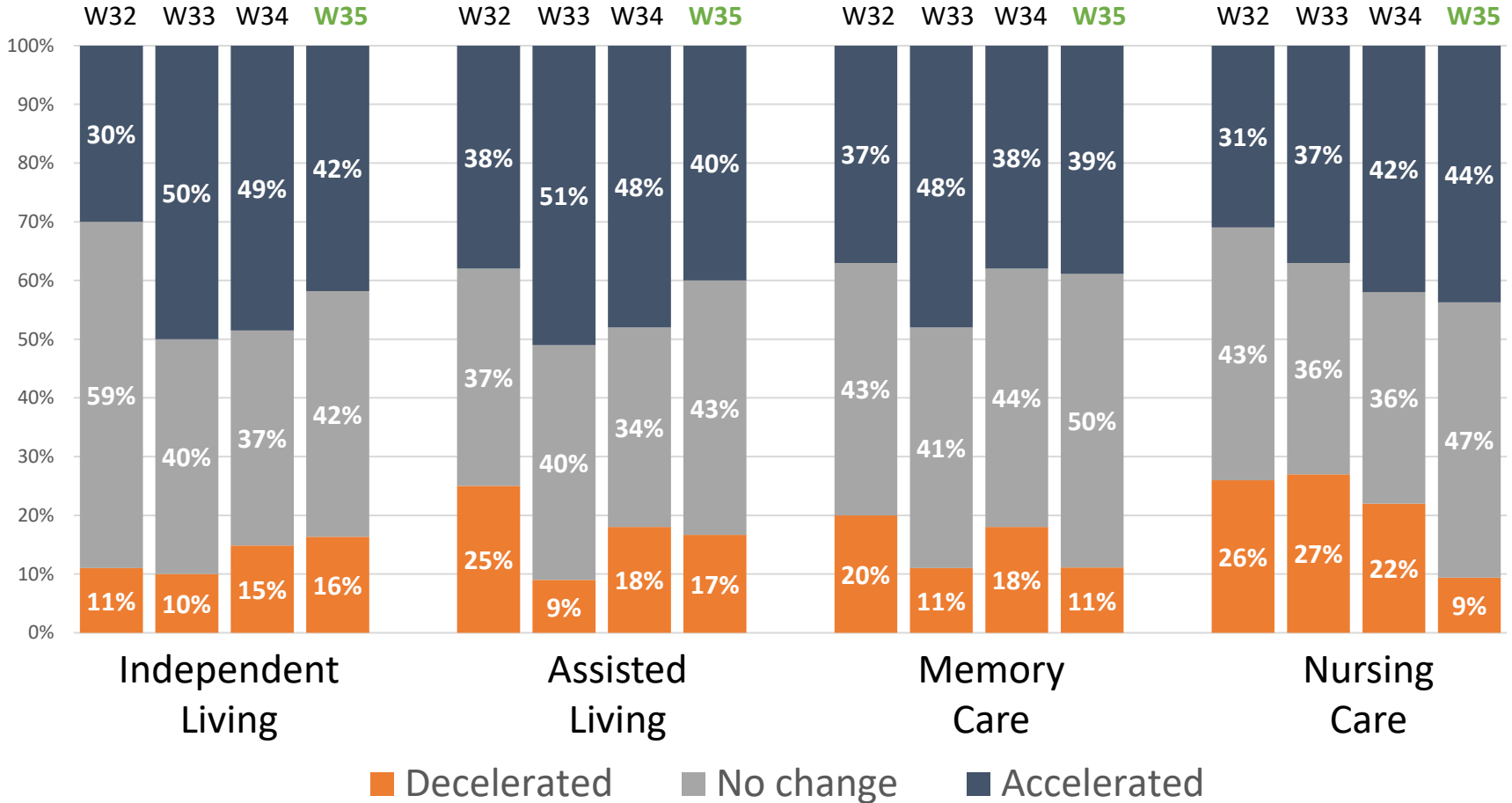
Organizations with lead volume at pre-pandemic levels

■ Yes ■ No



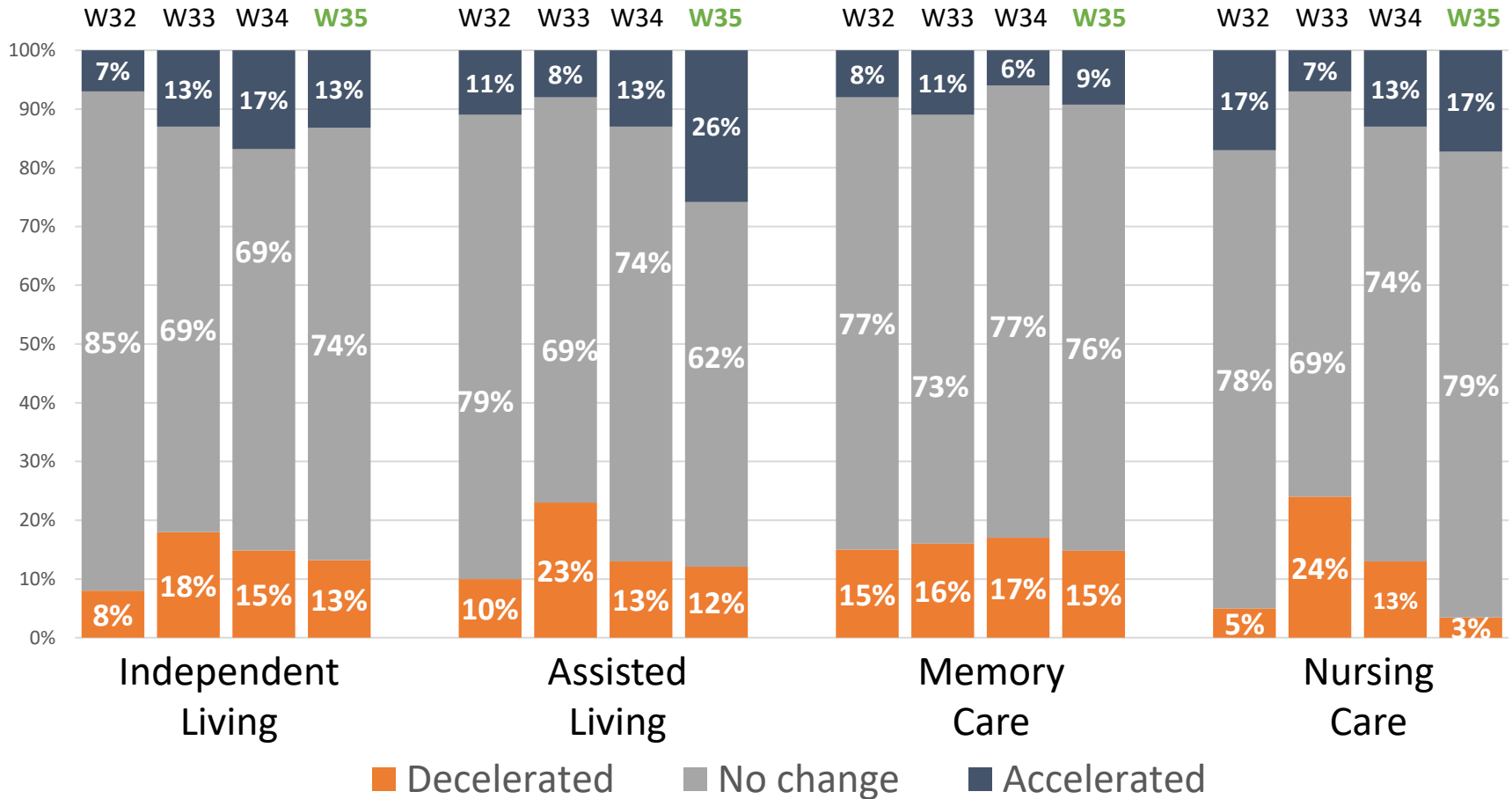
Wave 26 (benchmark) responses collected April 5 to April 18, 2021
Wave 35 responses collected November 8 to December 5, 2021
Source: NIC Executive Survey Insights

Pace of move-ins in past 30-days



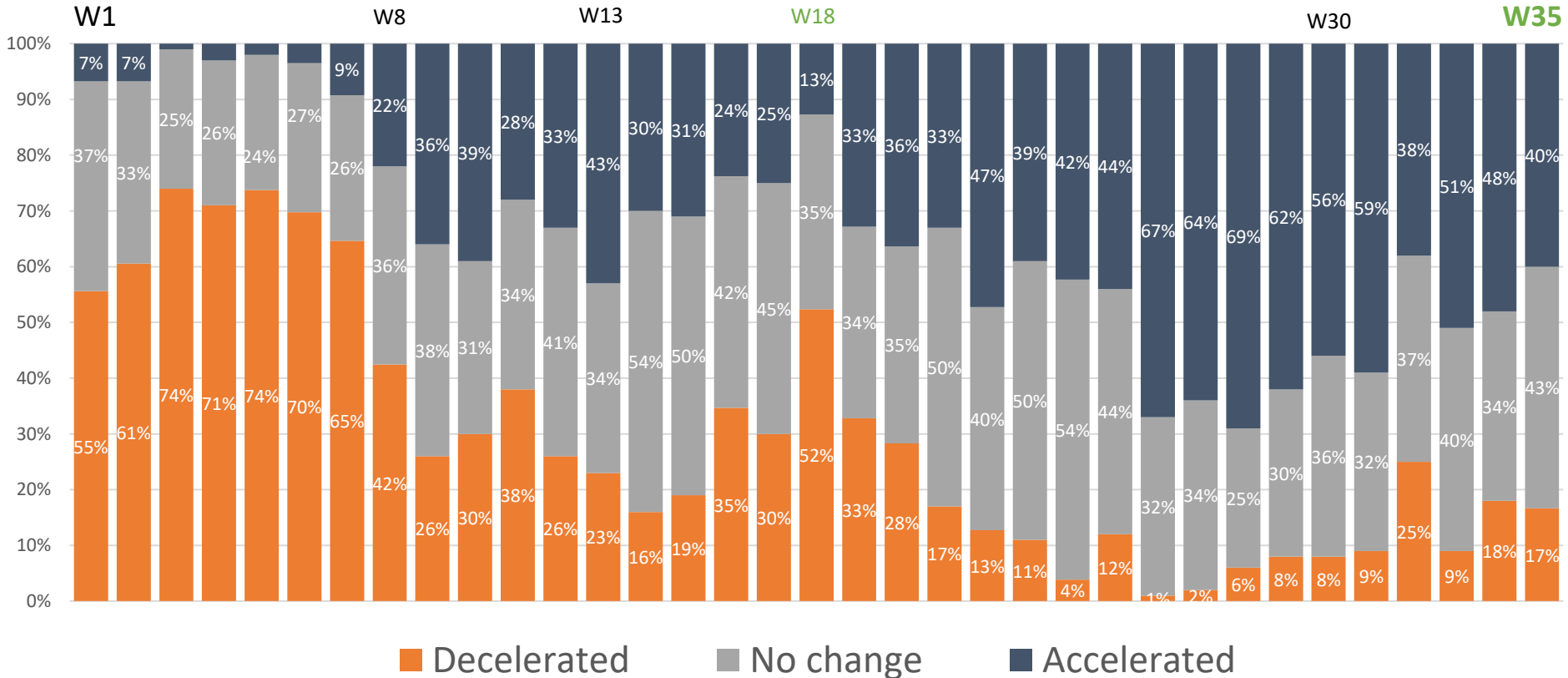
Wave 32 responses collected August 9 to September 6, 2021
 Wave 33 responses collected September 7 to October 3, 2021
 Wave 34 responses collected October 4 to November 7, 2021
 Wave 35 responses collected November 8 to December 5, 2021
 Source: NIC Executive Survey Insights

Pace of Move-Outs in Past 30-Days



Wave 32 responses collected August 9 to September 6, 2021
 Wave 33 responses collected September 7 to October 3, 2021
 Wave 34 responses collected October 4 to November 7, 2021
 Wave 35 responses collected November 8 to December 5, 2021
 Source: NIC Executive Survey Insights

Assisted Living Pace of Move-Ins Past 30-Days



March 24, 2020



December 5, 2021

Notable events:

Wave 8, data collected May 25 to June 7, 2020 (country opening)

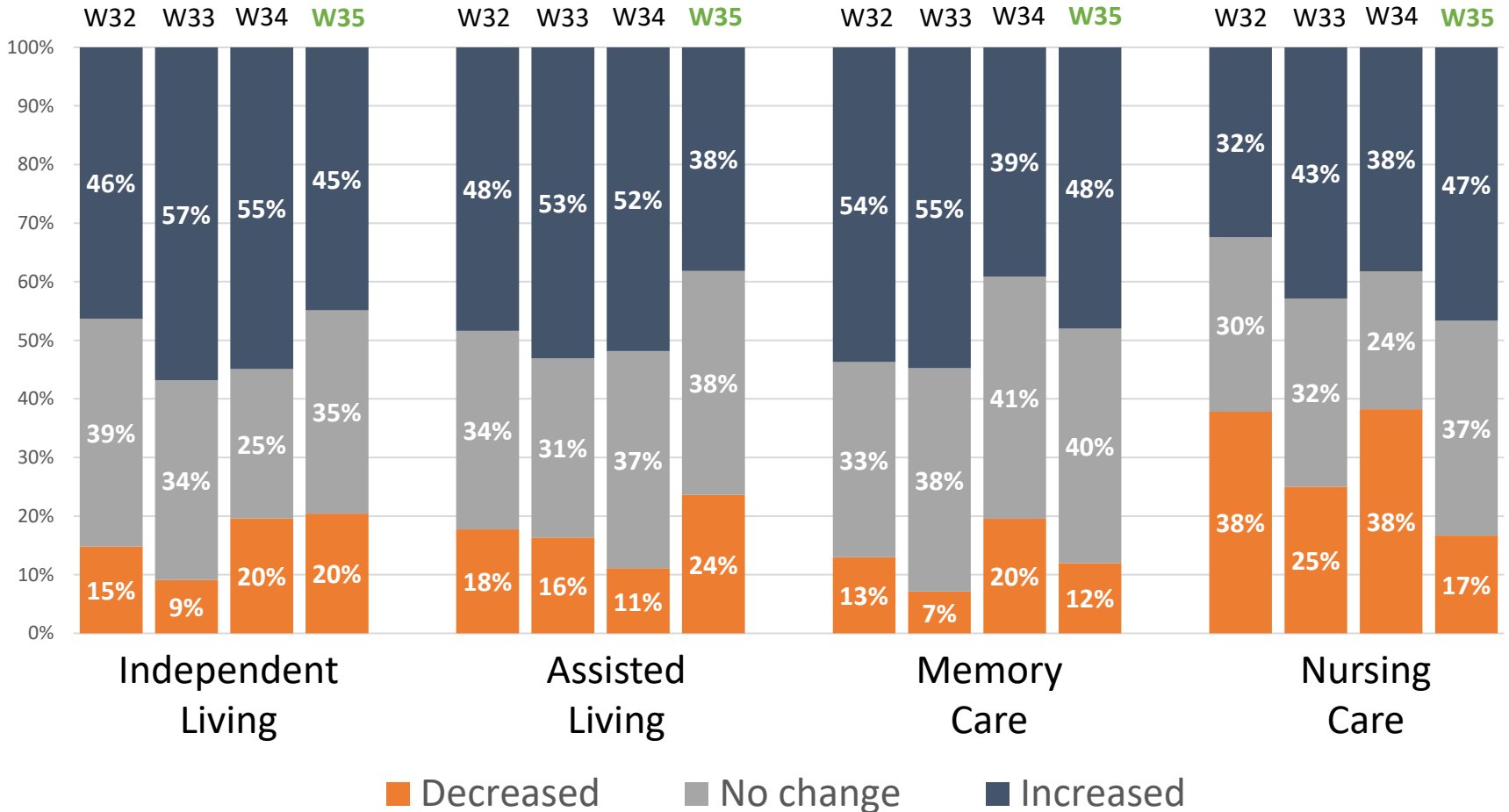
Wave 13 data collected September 28 to October 11, 2020 (Fall surge gearing up)

Wave 18 data collected December 14 to December 27, 2020 (began vaccine distribution to nursing care residents)

Wave 30 data collected June 14 to July 11, 2021 (delta variant begins to surge primarily among the unvaccinated)

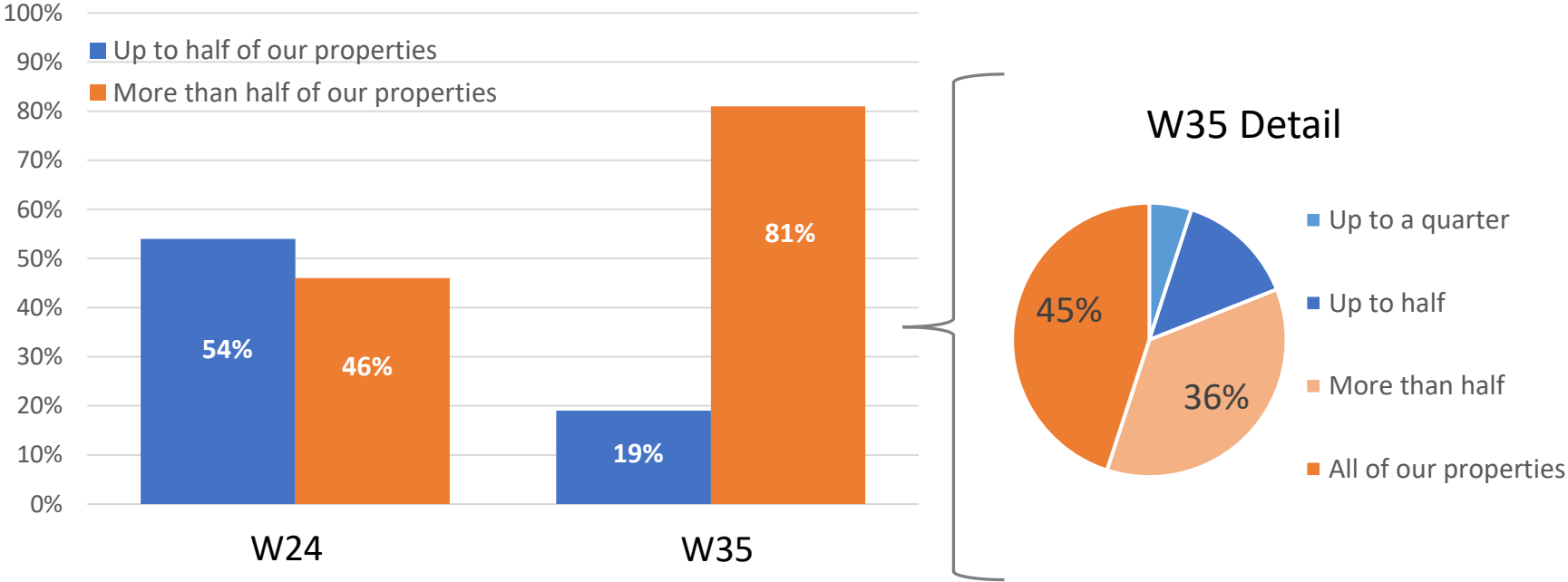
Source: NIC Executive Survey Insights

Change in occupancy by care segment: current vs. one month prior



Wave 32 responses collected August 9 to September 6, 2021
 Wave 33 responses collected September 7 to October 3, 2021
 Wave 34 responses collected October 4 to November 7, 2021
 Wave 35 responses collected November 8 to December 5, 2021
 Source: NIC Executive Survey Insights

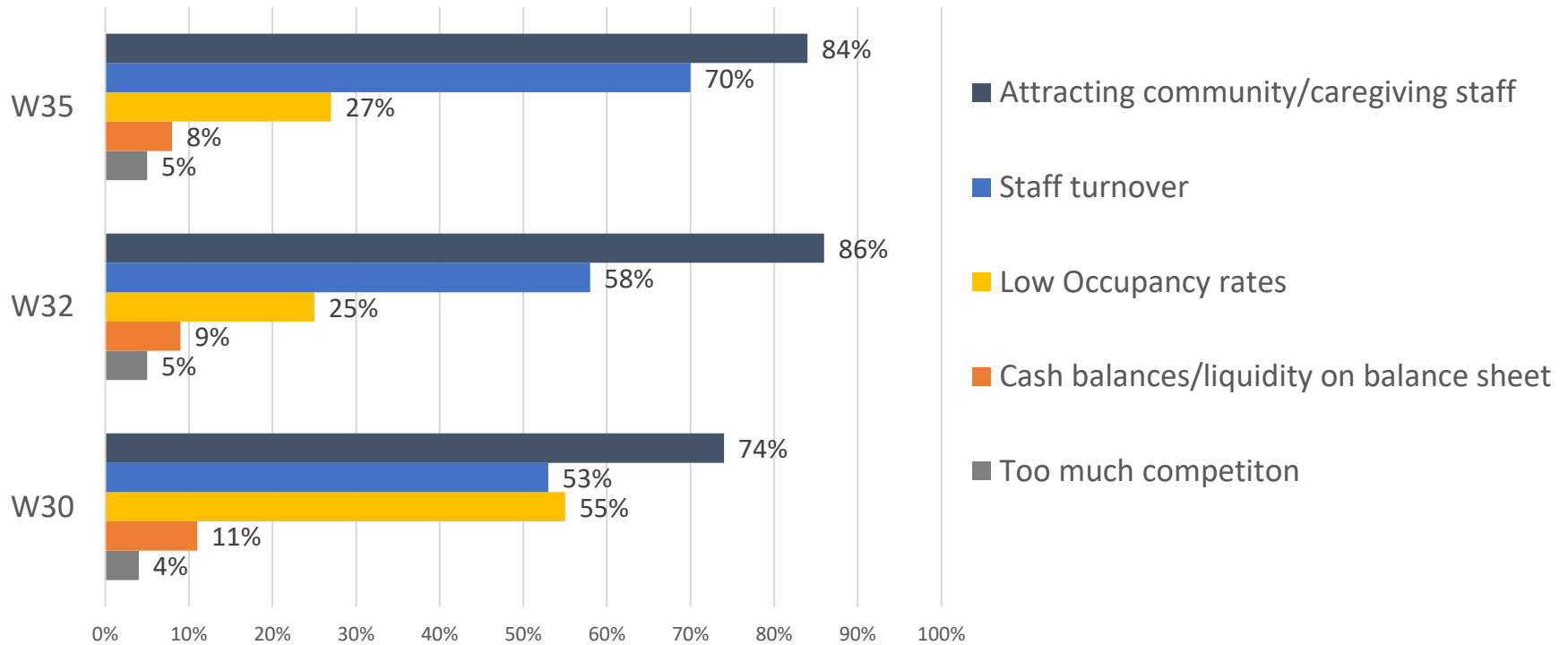
Organizations with multiple properties experiencing staffing shortages in % of properties*



Wave 24 response collected March 8 to March 21, 2021
 Wave 35 responses collected November 8 to December 5, 2021
 Source: NIC Executive Survey Insights

*Respondents with three or more properties

Biggest challenges to the organization*



**Top 2 box shown, multiple responses allowed*

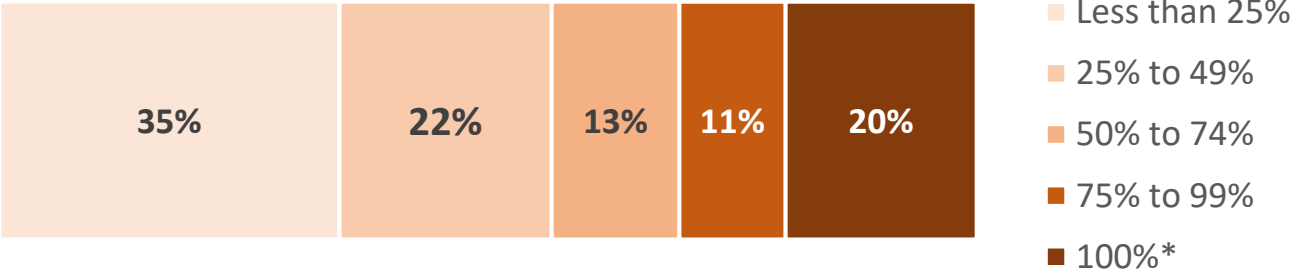
Wave 30 responses collected June 14 to July 11, 2021

Wave 32 responses collected August 9 to September 6, 2021

Wave 35 responses collected November 8 to December 5, 2021

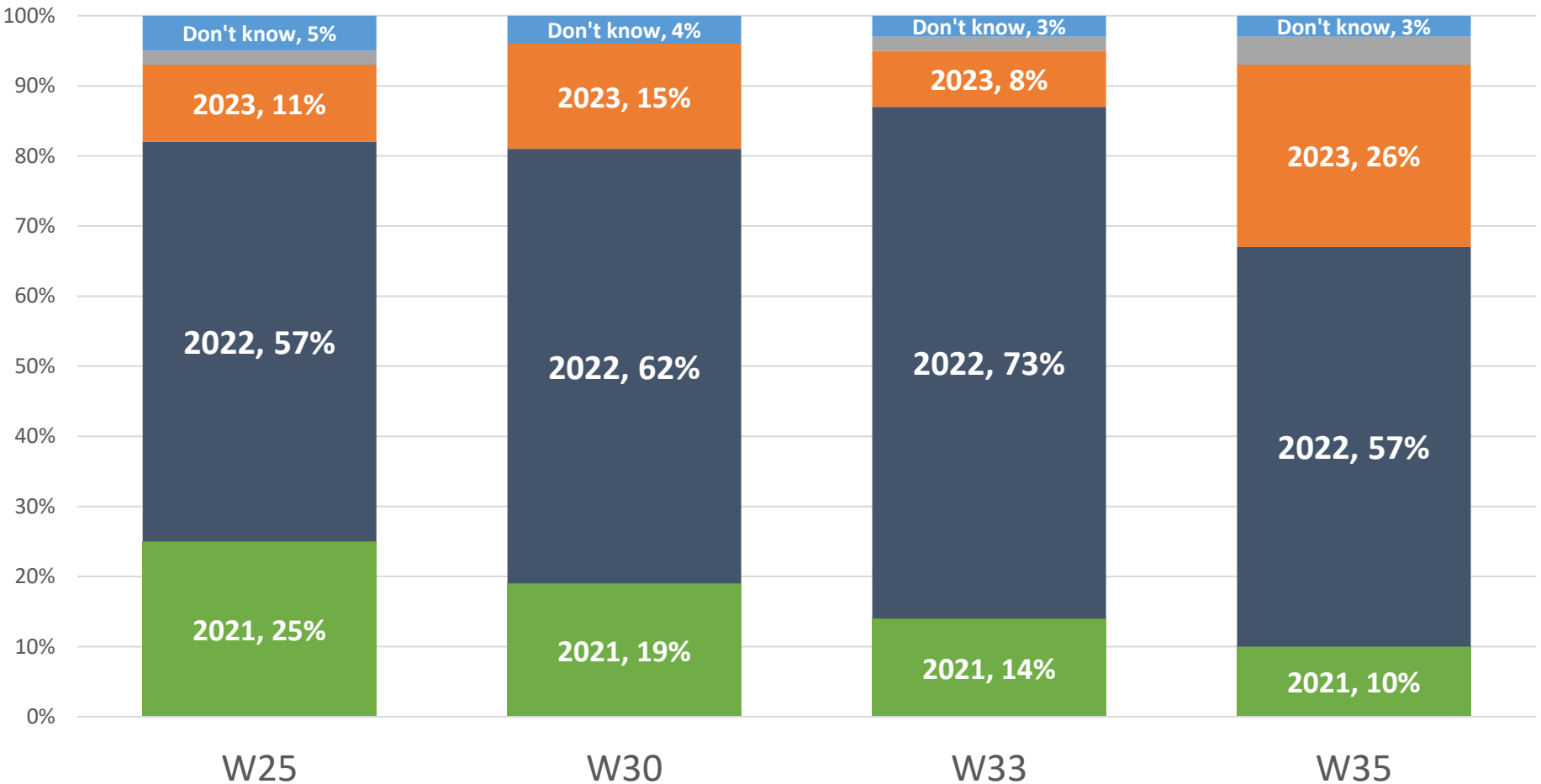
Source: NIC Executive Survey Insights

Organization's use of agency/temp staff has increased this year by...



Wave 35 responses collected November 8 to December 5, 2021
*A few respondents remarked that use of agency/temp staff increased more than 100%
Source: NIC Executive Survey Insights

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

Wave 35 responses collected November 8 to December 5, 2021

Source: NIC Executive Survey Insights

EXECUTIVE SURVEY
INSIGHTS
MARKET FUNDAMENTALS



NIC Executive Survey Insights Timeline

- Wave 1: 3/24 – 4/31
- Wave 2: 4/1 – 4/12
- Wave 3: 4/13 – 4/19
- Wave 4: 4/20 – 4/26
- Wave 5: 4/27 – 5/3
- Wave 6: 5/4 – 5/10
- Wave 7: 5/11 – 5/24
- Wave 8: 5/25 – 6/7
- Wave 9: 6/22 – 7/5
- Wave 10: 7/20 – 8/2
- Wave 11: 8/17 – 8/30
- Wave 12: 9/15 – 9/27
- Wave 13: 9/28 – 10/11
- Wave 14: 10/12 – 10/25
- Wave 15: 10/26 – 11/8
- Wave 16: 11/9 – 11/22
- Wave 17: 11/30 – 12/13
- Wave 18: 12/14 – 12/27
- Wave 19: 12/28 – 1/10
- Wave 20: 1/11 – 1/24
- Wave 21: 1/25 – 2/7
- Wave 22: 2/8 – 2/21
- Wave 23: 2/22 – 3/7
- Wave 24: 3/8 – 3/21
- Wave 25: 3/22 – 4/4
- Wave 26: 4/5 – 4/18
- Wave 27: 4/19 – 5/2
- Wave 28: 5/3 – 5/16
- Wave 29: 5/17 to 6/13
- Wave 30: 6/14 to 7/11
- Wave 31: 7/12 – 8/8
- Wave 32: 8/9 – 9/6
- Wave 33: 9/7 – 10/3
- Wave 34: 10/4 – 11/7
- Wave 35: 11/8 – 12/5