



# Executive Survey Insights

## Wave 36

December 6, 2021 – January 9, 2022

- Report Graphs

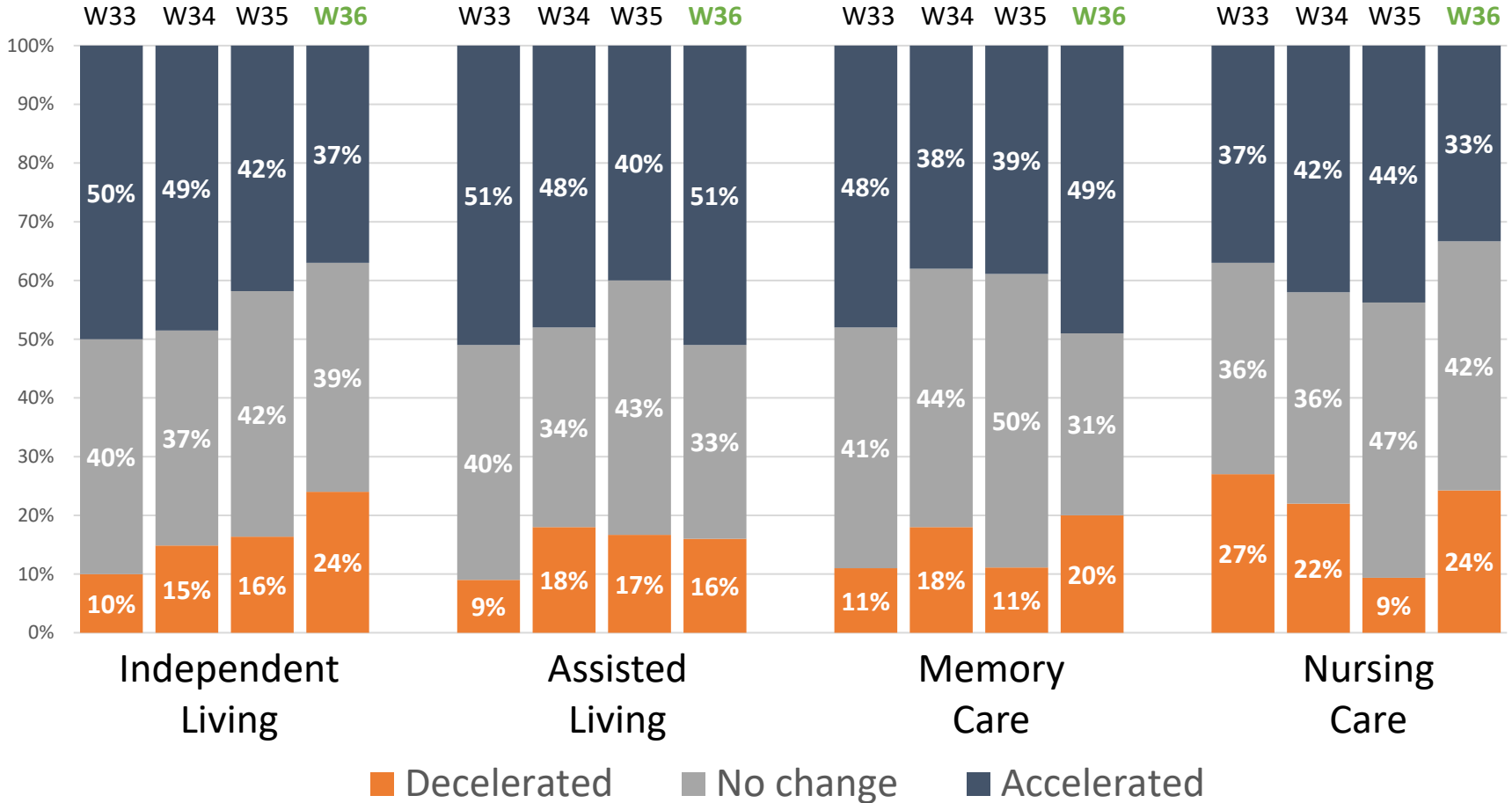
EXECUTIVE SURVEY  
INSIGHTS  
MARKET FUNDAMENTALS



# NIC Executive Survey Insights Timeline

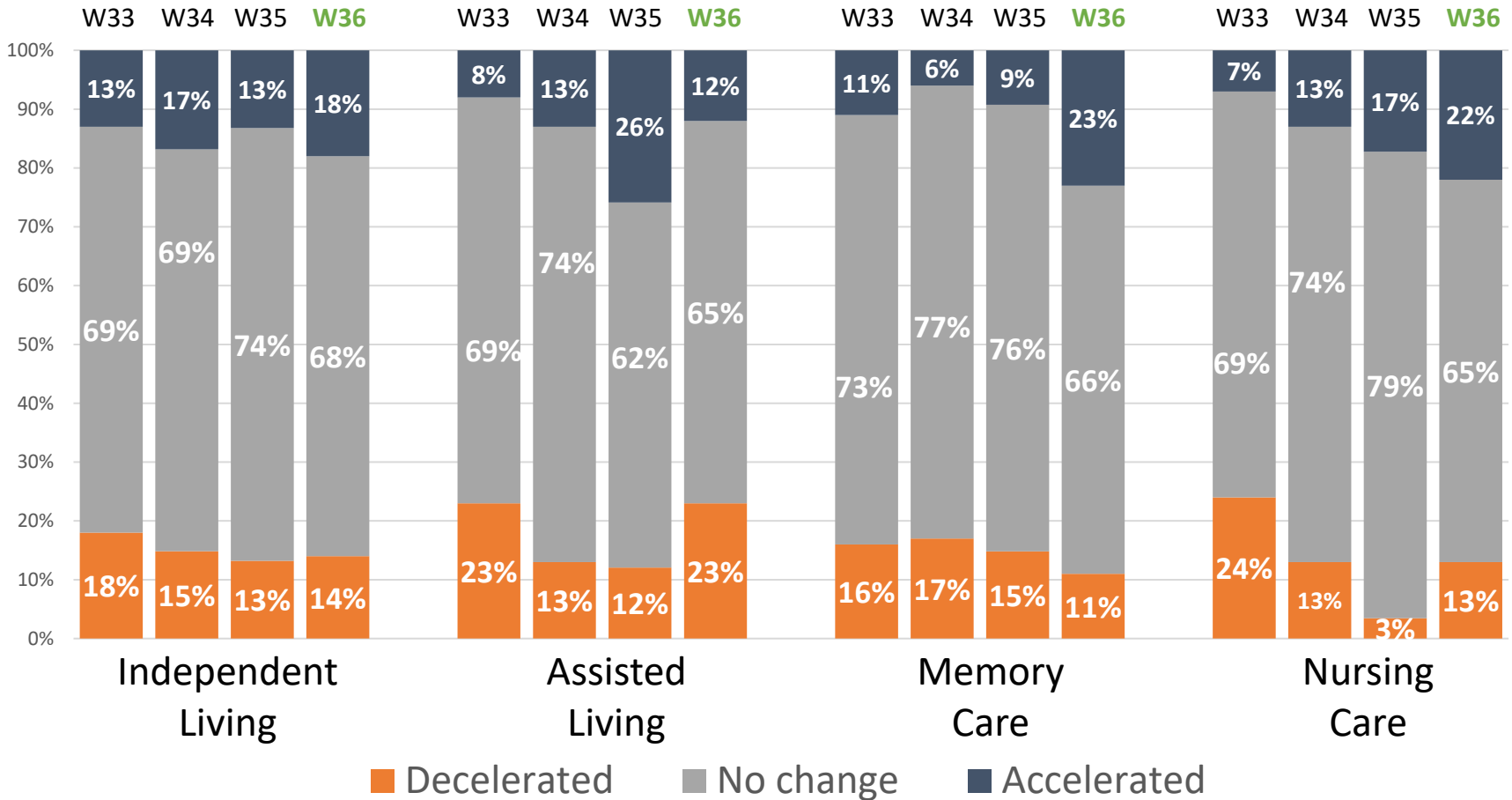
- Wave 1: 3/24 – 4/31 (2020)
- Wave 2: 4/1 – 4/12
- Wave 3: 4/13 – 4/19
- Wave 4: 4/20 – 4/26
- Wave 5: 4/27 – 5/3
- Wave 6: 5/4 – 5/10
- Wave 7: 5/11 – 5/24
- Wave 8: 5/25 – 6/7
- Wave 9: 6/22 – 7/5
- Wave 10: 7/20 – 8/2
- Wave 11: 8/17 – 8/30
- Wave 12: 9/15 – 9/27
- Wave 13: 9/28 – 10/11
- Wave 14: 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 (2021)
- 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
- Wave 36: 12/6 – 1/9 (2022)

## Pace of move-ins in past 30-days



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  
 Wave 36 data collected December 6, 2021, to January 9, 2022  
 Source: NIC Executive Survey Insights

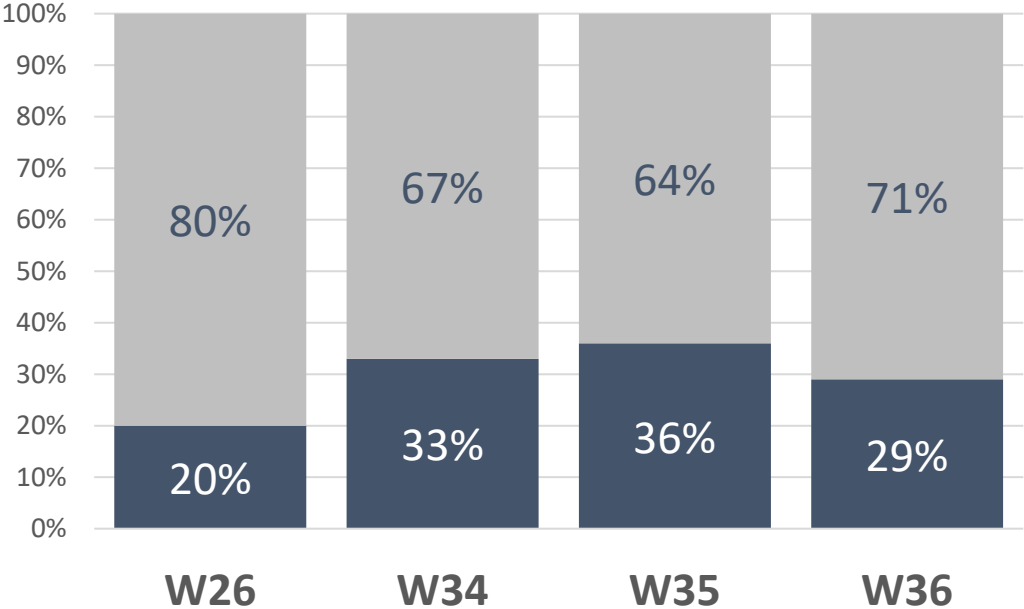
## Pace of Move-Outs in Past 30-Days



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  
 Wave 36 data collected December 6, 2021, to January 9, 2022  
 Source: NIC Executive Survey Insights

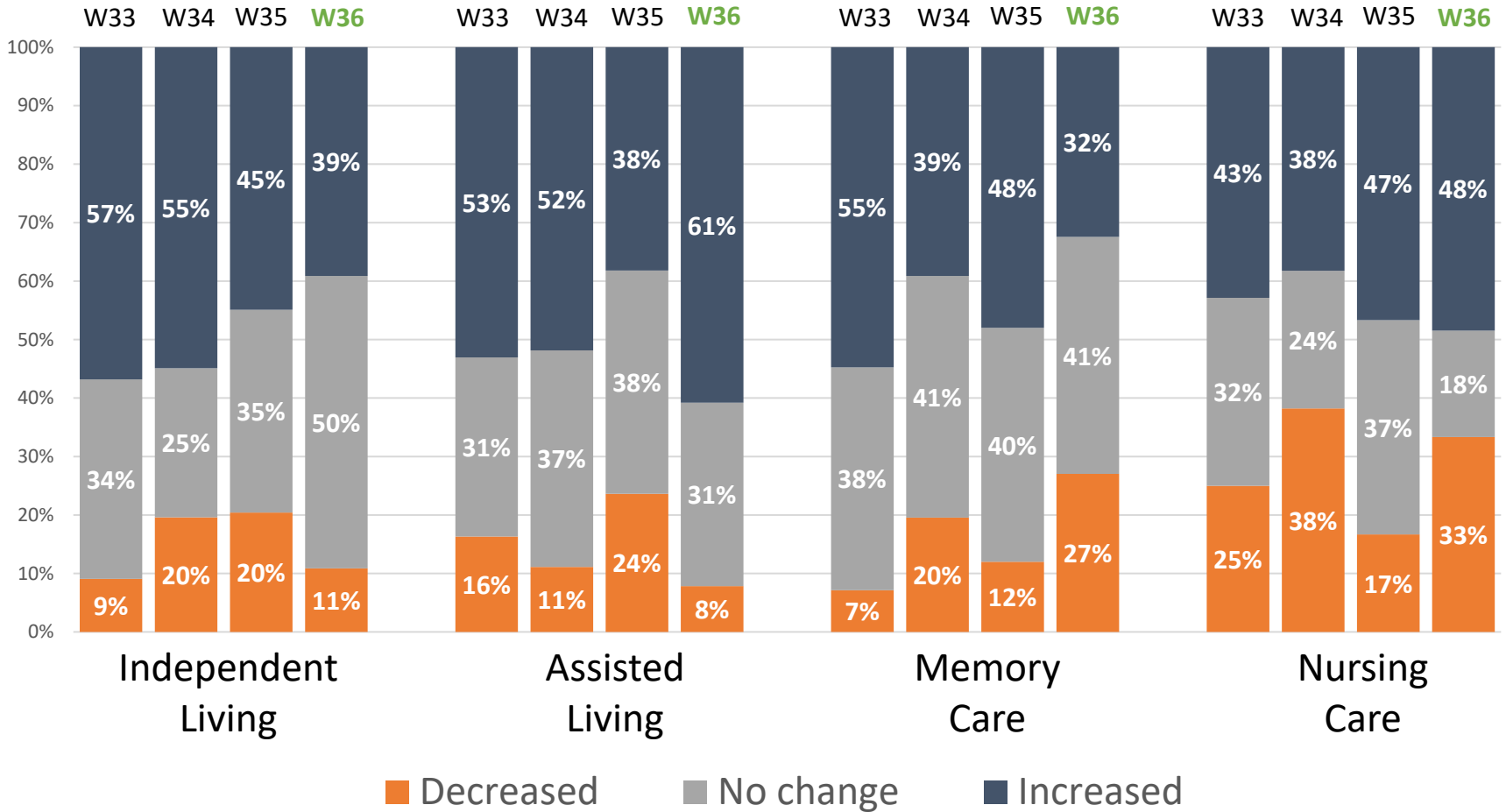
# Organizations with lead volume at pre-pandemic levels

■ Yes ■ No



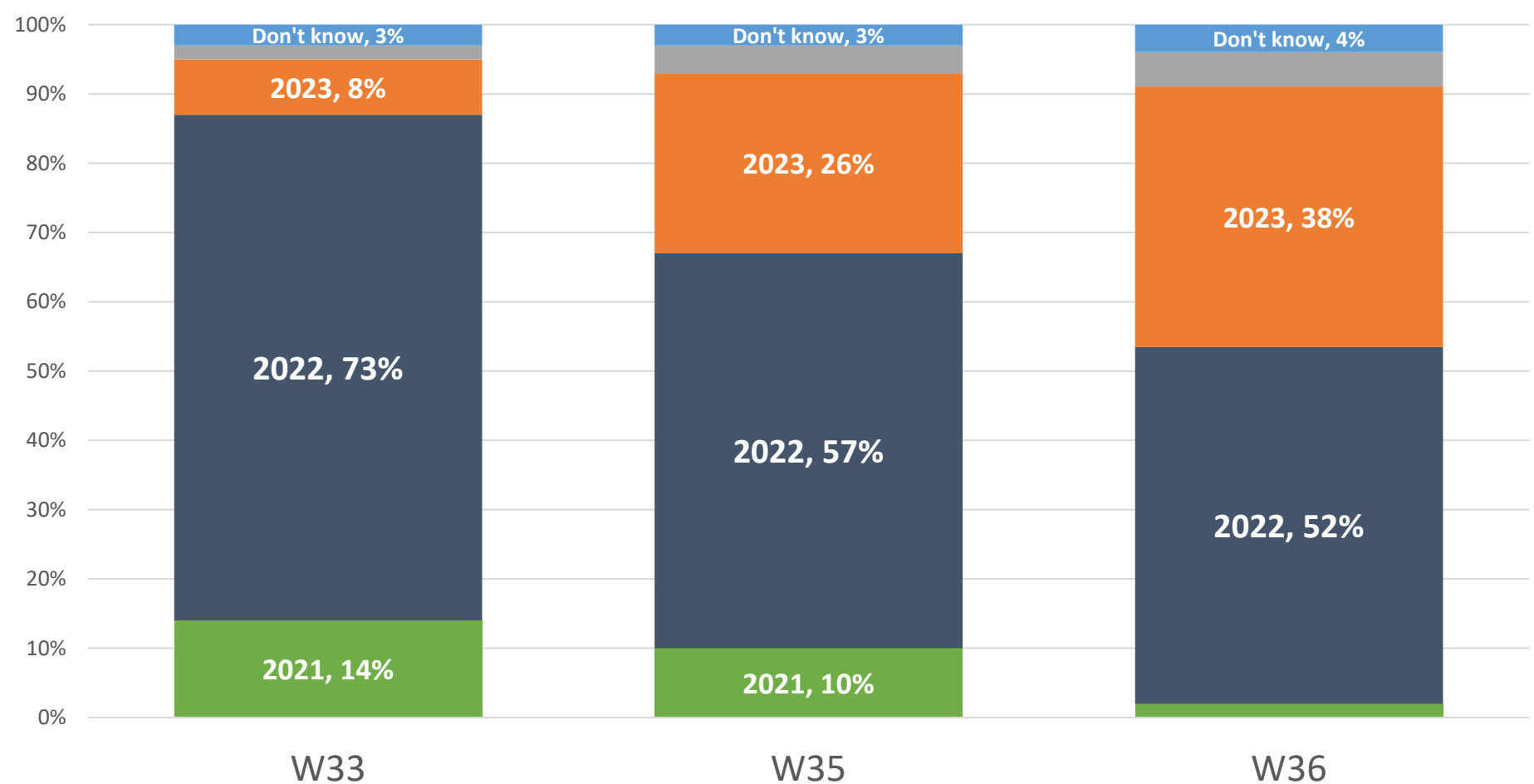
Wave 26 responses collected April 5 to April 18, 2021  
Wave 34 responses collected October 4 to November 7, 2021  
Wave 35 responses collected November 8 to December 5, 2021  
Wave 36 responses collected December 6, 2021, to January 9, 2022  
Source: NIC Executive Survey Insights

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



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  
 Wave 36 data collected December 6, 2021, to January 9, 2022  
 Source: NIC Executive Survey Insights

## Occupancy expected to return to pre-pandemic levels:



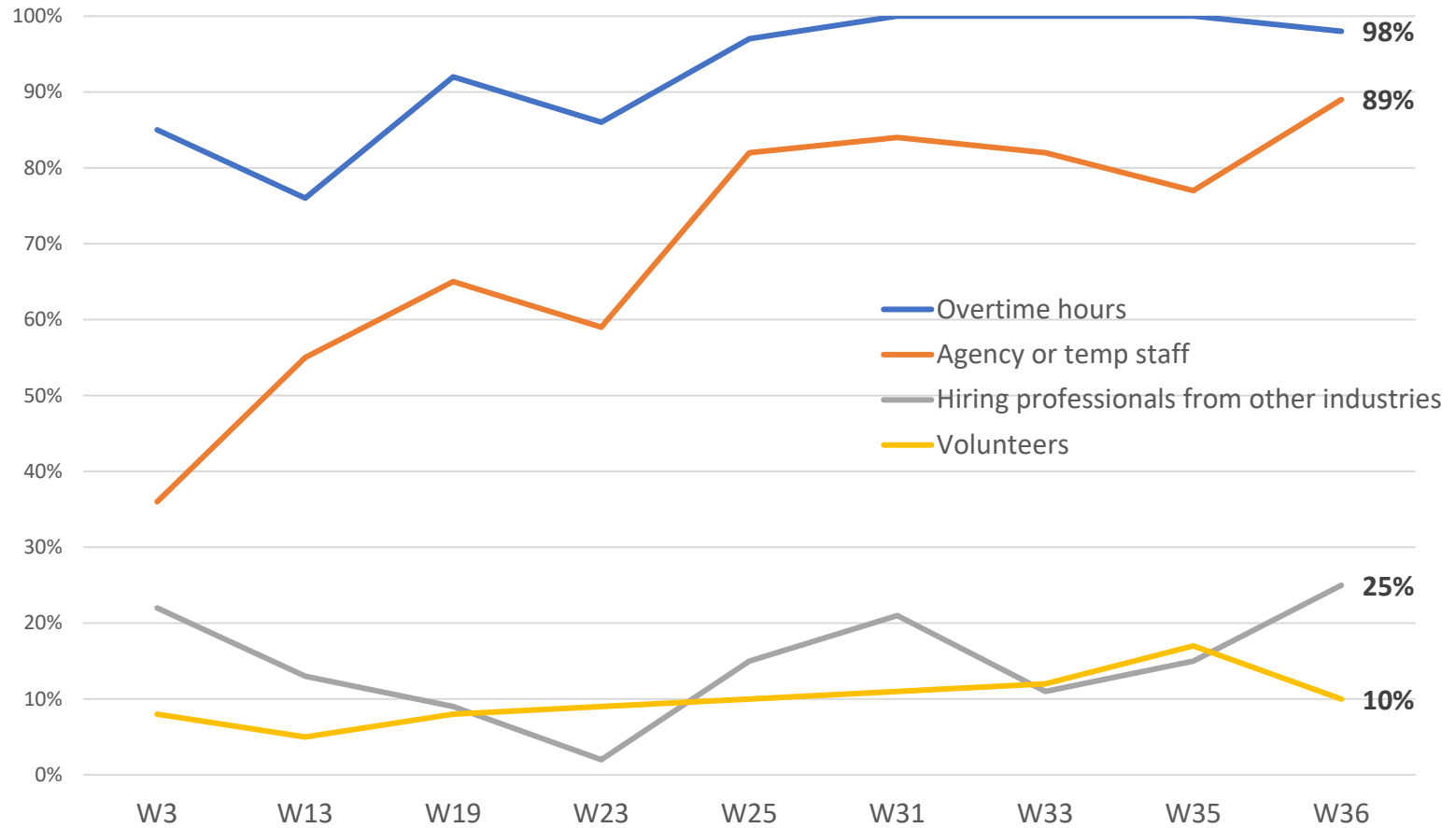
Wave 33 responses collected September 7 to October 3, 2021

Wave 35 responses collected November 8 to December 5, 2021

Wave 36 responses collected December 6, 2021, to January 9, 2022

Source: NIC Executive Survey Insights

## Organizations backfilling staffing shortages with...



April 13, 2020

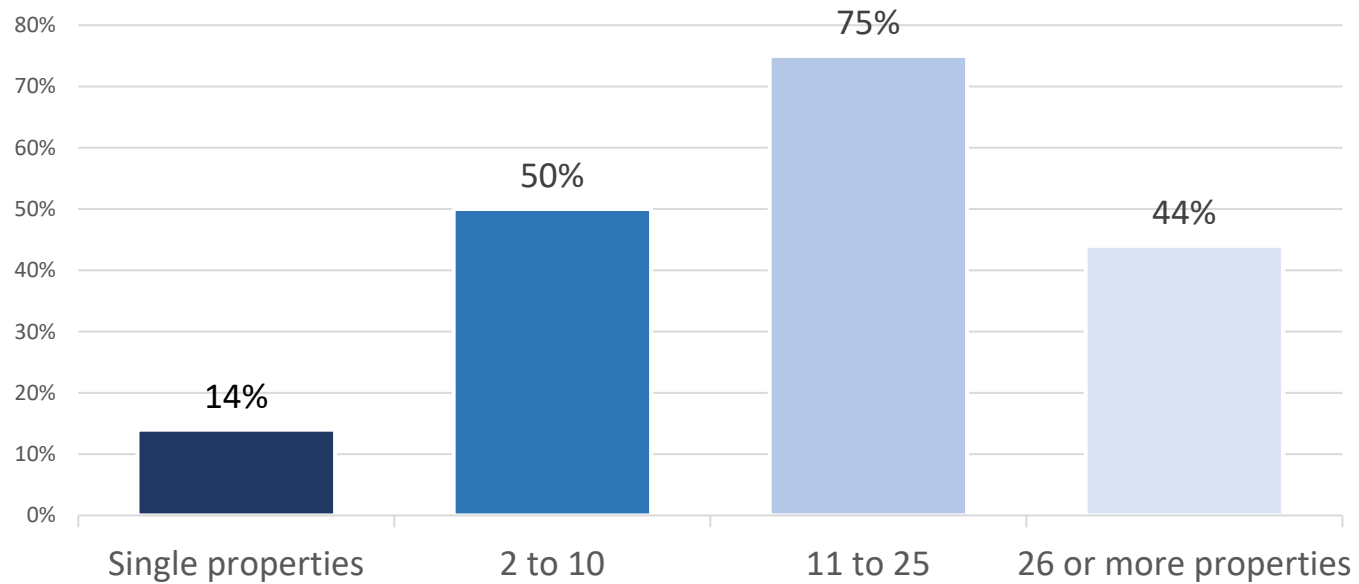


January 9, 2022

Source: NIC Executive Survey Insights



## % Organizations offering rent concessions by size



Wave 36 responses collected December 6, 2021, to January 9, 2022

Source: NIC Executive Survey Insights

# Operating margin expectation in the next six months



Wave 33 responses collected September 7 to October 3, 2021  
 Wave 35 responses collected November 8 to December 5, 2021  
 Wave 36 responses collected December 6, 2021, to January 9, 2022  
 Note: Question not asked in all survey waves  
 Source: NIC Executive Survey Insights