



Executive Survey Insights

Wave 45:

August 21 to September 18, 2022

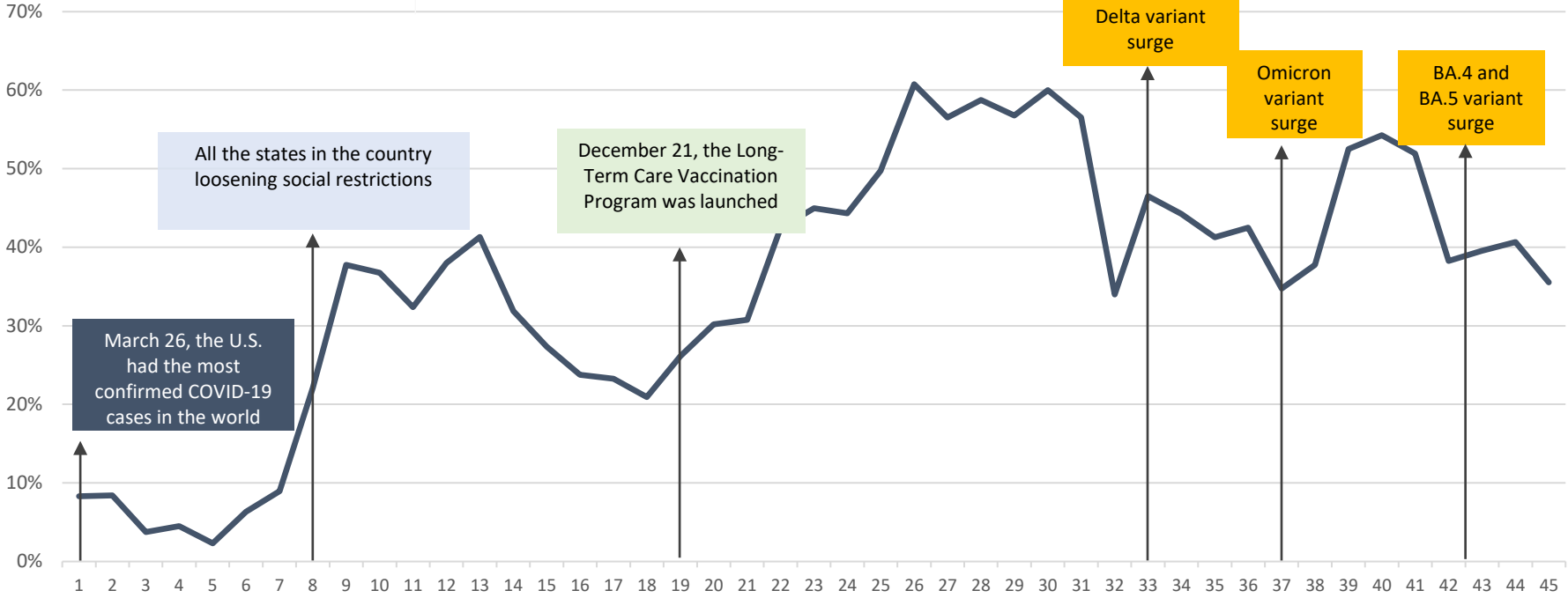
- Report Graphs
 - Pace of Move-Ins and Move-Outs
 - Lead Volume
 - Operating Expenses
 - Severity of Staffing Shortages
 - Agency Usage Expectations
 - Staff Tenure
 - Anticipated Staffing Recovery
 - Product Diversification

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)
Wave 37: 1/10 – 2/6
Wave 38: 2/7 to 3/6
Wave 39: 3/7 to 4/3
Wave 40: 4/4 to 5/1
Wave 41: 5/2 to 5/27
Wave 42: 5/31 to 6/26
Wave 43: 6/27 to 7/24
Wave 44: 7/25 to 8/20
Wave 45: 8/21 to 9/18

Organizations reporting an increase in the pace of move-ins* since the beginning of the pandemic



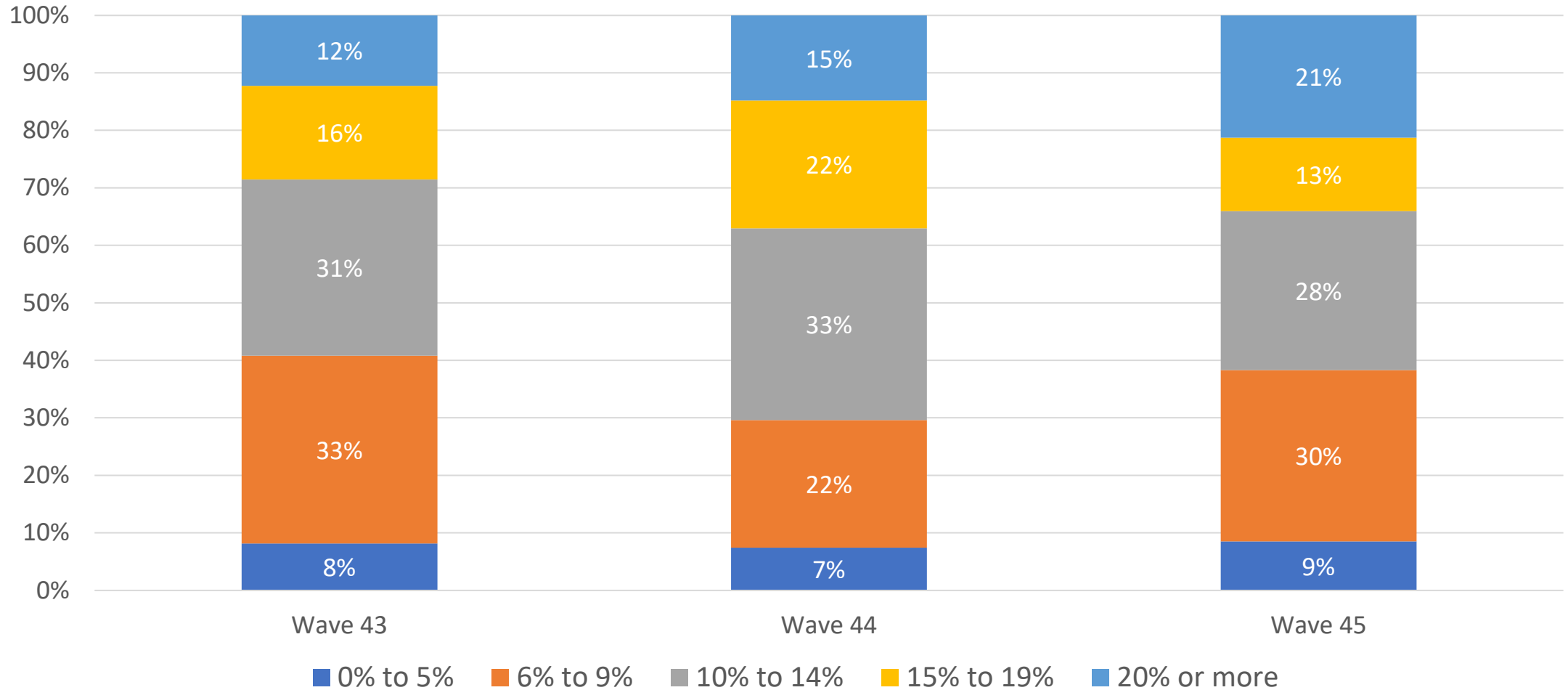
March 24, 2020



September 18, 2022

*Average of IL/AL/MC/NC
 Source: NIC Executive Survey Insights

Operating Expense Increases Since the Beginning of COVID-19 Pandemic



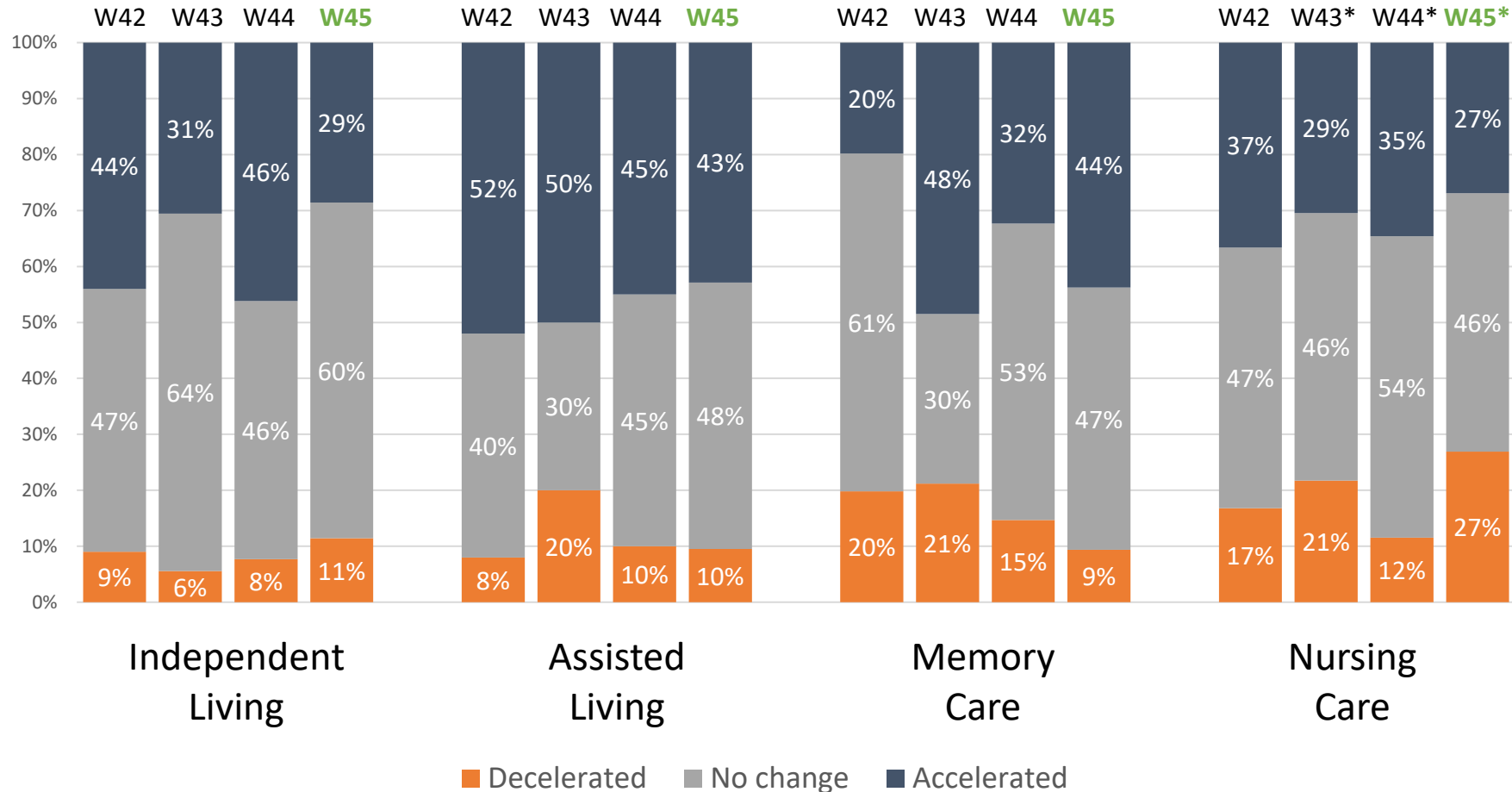
Wave 43 responses were collected from June 27 to July 24, 2022

Wave 44 responses were collected from July 25 to August 21, 2022

Wave 45 responses were collected from August 22 to September 18, 2022

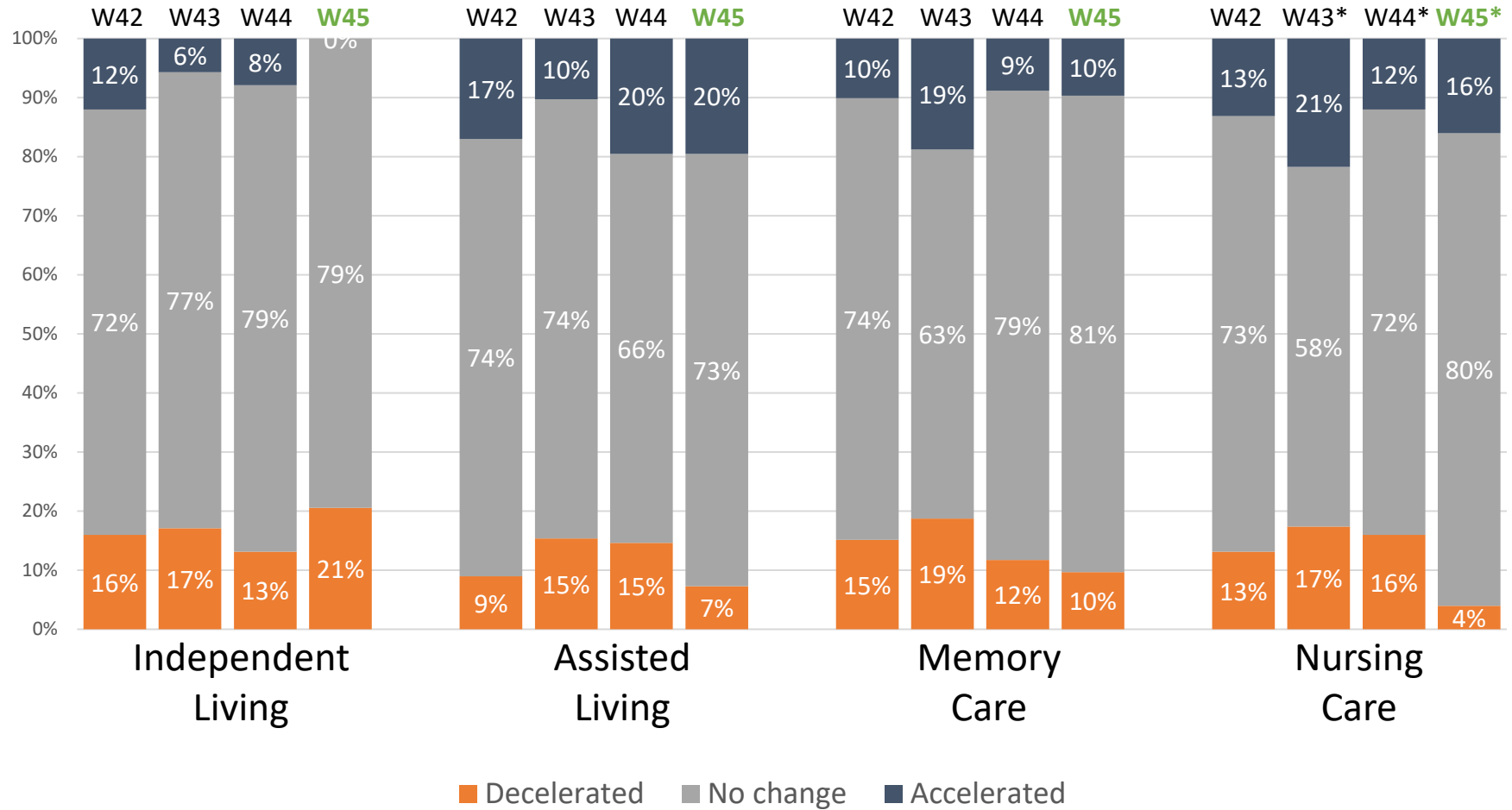
Source: NIC Executive Survey Insights

Pace of Move-Ins in Past 30 Days ESI Waves 42-45



Wave 42 responses were collected from May 31 to June 26, 2022
 Wave 43 responses were collected from June 27 to July 24, 2022
 Wave 44 responses were collected from July 25 to August 21, 2022
 Wave 45 responses were collected from August 22 to September 18, 2022
 Source: NIC Executive Survey Insights
 *Sample size <30

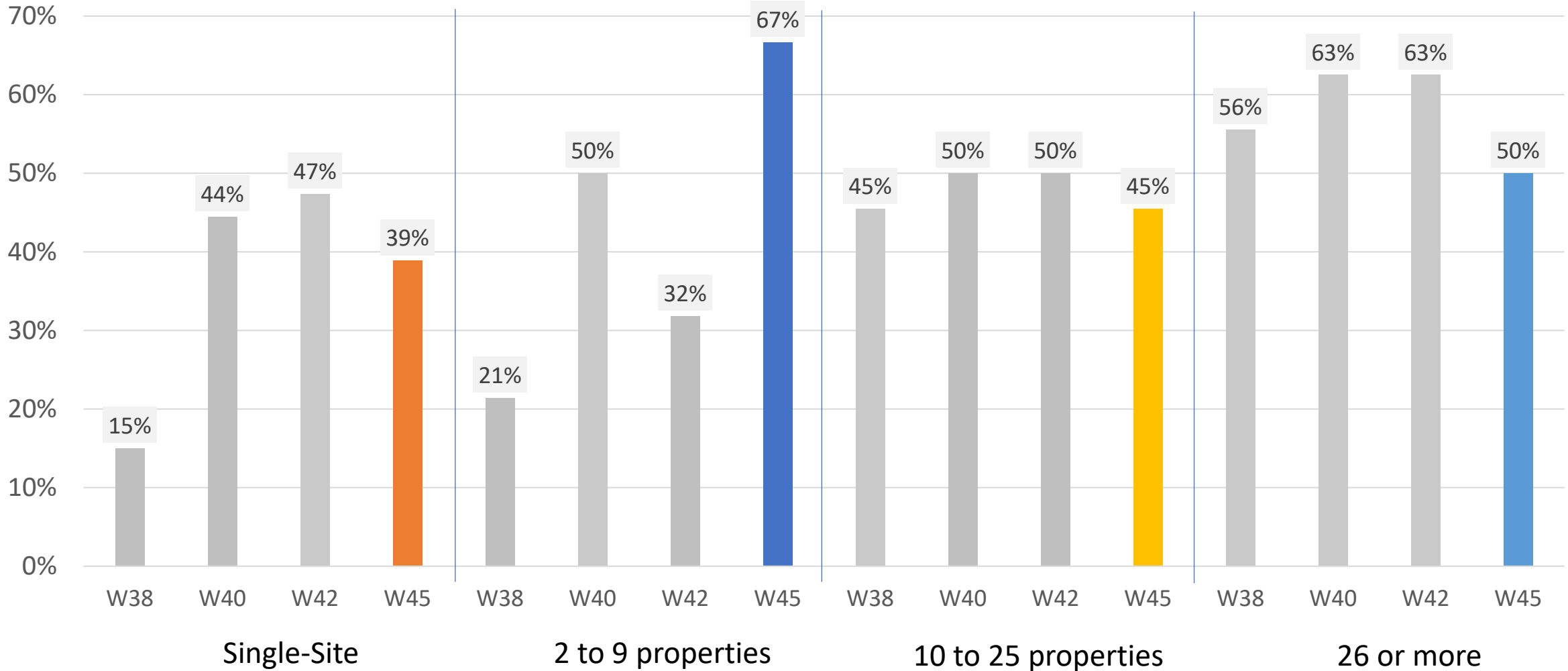
Pace of Move-Outs in Past 30 Days ESI Waves 42-45



Wave 42 responses were collected from May 31 to June 26, 2022
 Wave 43 responses were collected from June 27 to July 24, 2022
 Wave 44 responses were collected from July 25 to August 21, 2022
 Wave 45 responses were collected from August 22 to September 18, 2022
 Source: NIC Executive Survey Insights
 *Sample size <30

Organizations With Lead Volume Above Pre-Pandemic Levels by Size

Wave 38 vs. Wave 40 vs. Wave 42 vs. Wave 45



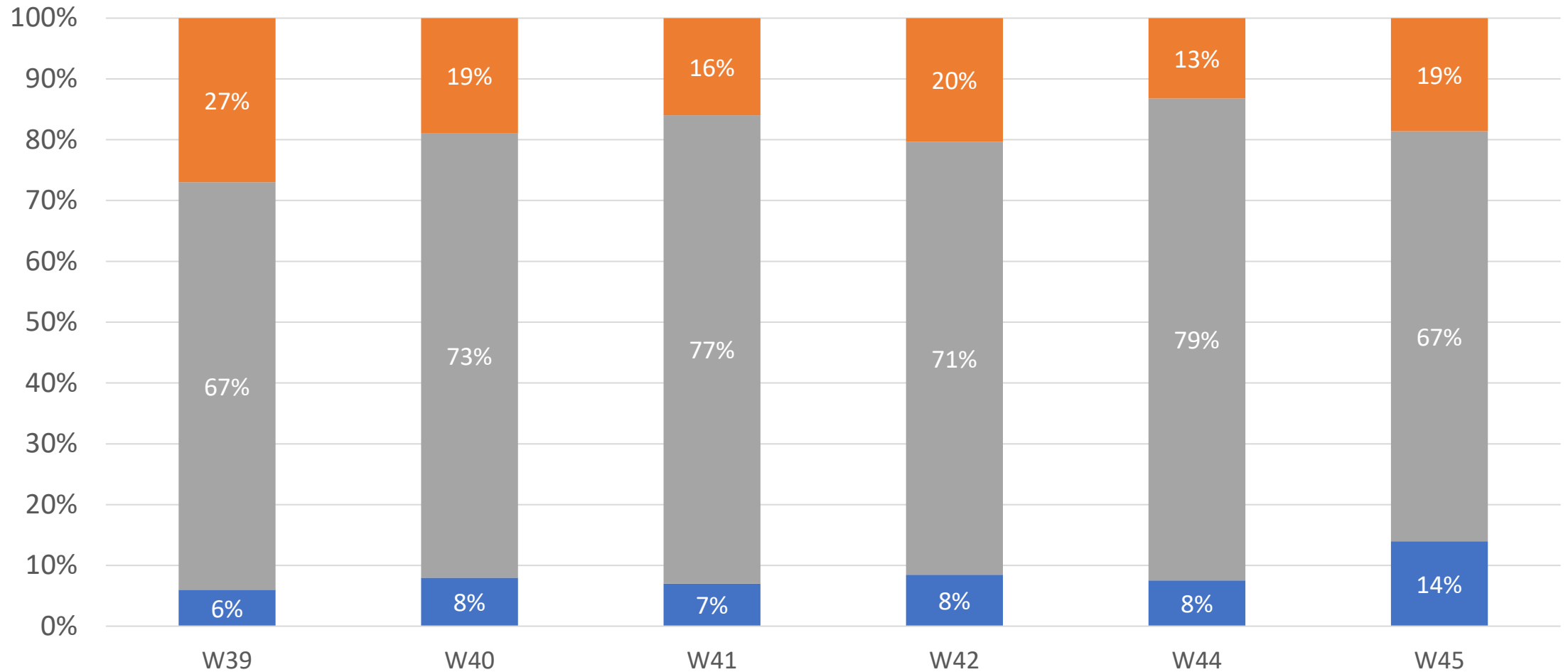
Wave 38 responses were collected from February 7 to March 6, 2022

Wave 40 responses were collected from April 4 to May 1, 2022

Wave 42 responses were collected from May 31 to June 26, 2022

Wave 45 responses were collected from August 22 to September 18, 2022

Severity of Staffing Shortages ESI Waves 39-45



■ Minimal ■ Moderate ■ Severe

Wave 39 responses were collected from March 7 to April 3, 2022

Wave 40 responses were collected from April 4 to May 1, 2022

Wave 41 responses were collected from May 2 to May 27, 2022

Wave 42 responses were collected from May 31 to June 26, 2022

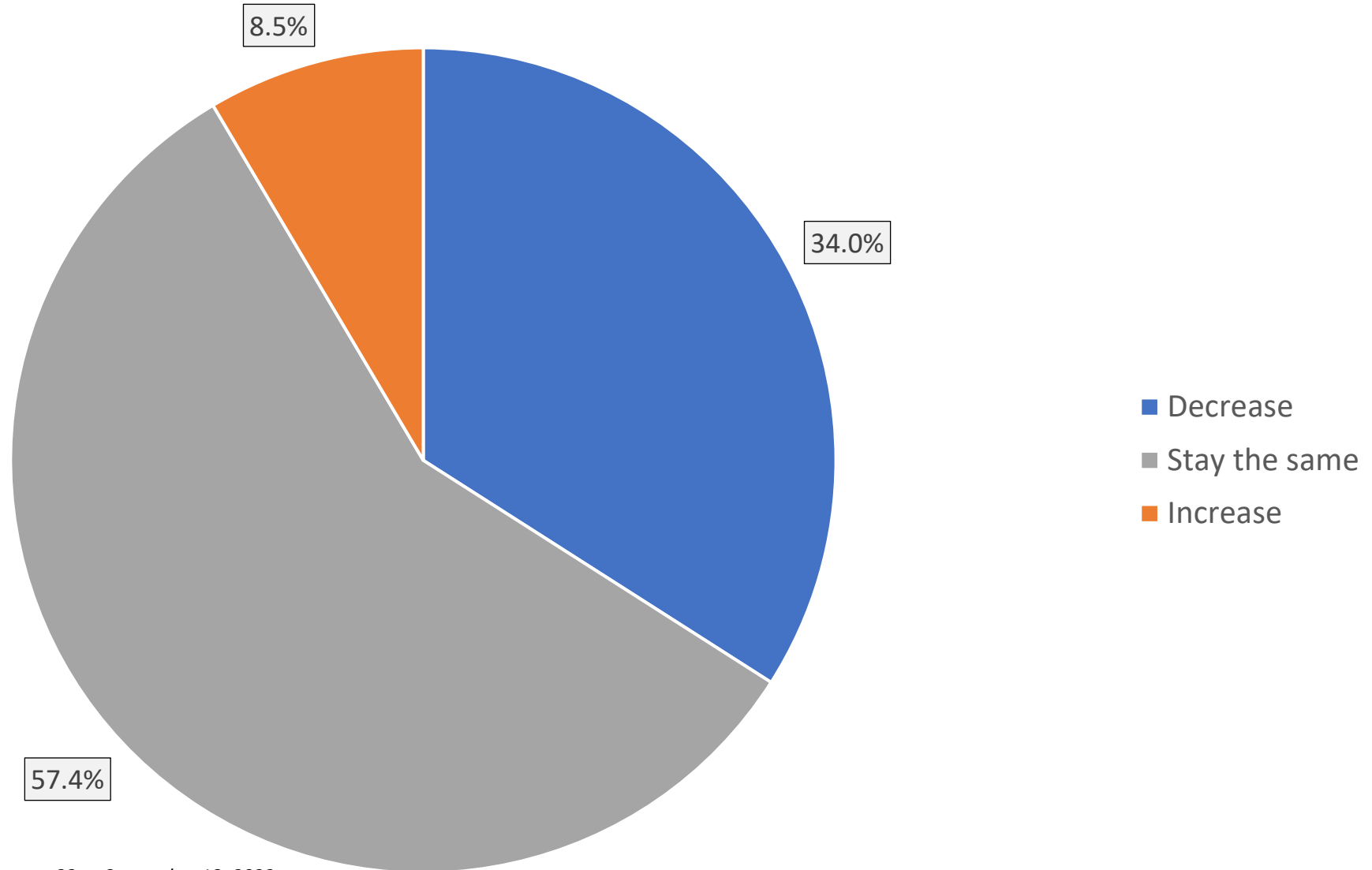
Wave 44 responses were collected from July 25 to August 21, 2022

Wave 45 responses were collected from August 22 to September 18, 2022

Source: NIC Executive Survey Insights

Agency Usage Expectations Over the Next Six Months

ESI Wave 45

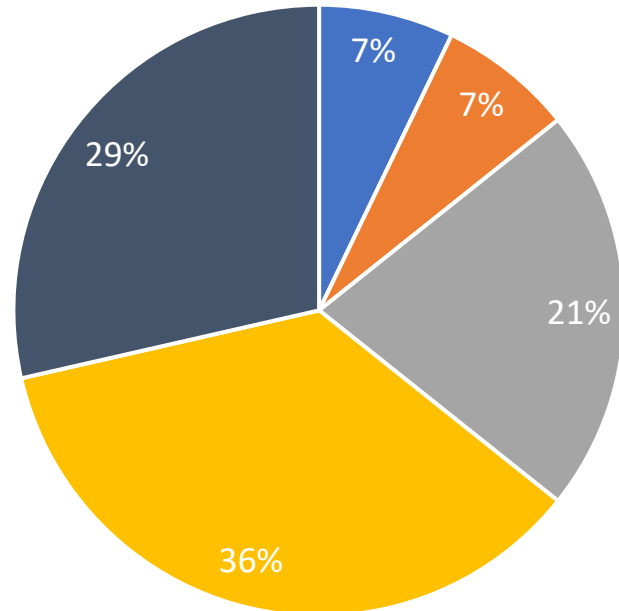


Wave 45 responses were collected from August 22 to September 18, 2022
Source: NIC Executive Survey Insights

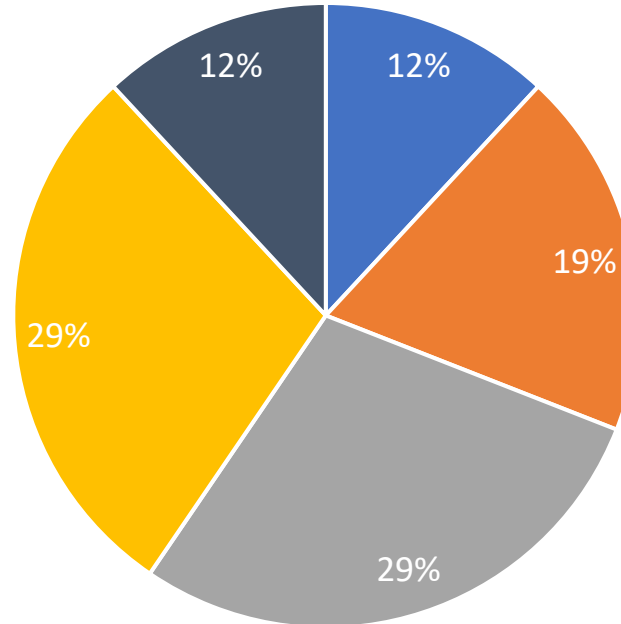
Share of Organizations Reporting Average Staff Tenure ESI Wave 45

■ 0-20% ■ 21-40% ■ 41-60% ■ 61-80% ■ 81-100%

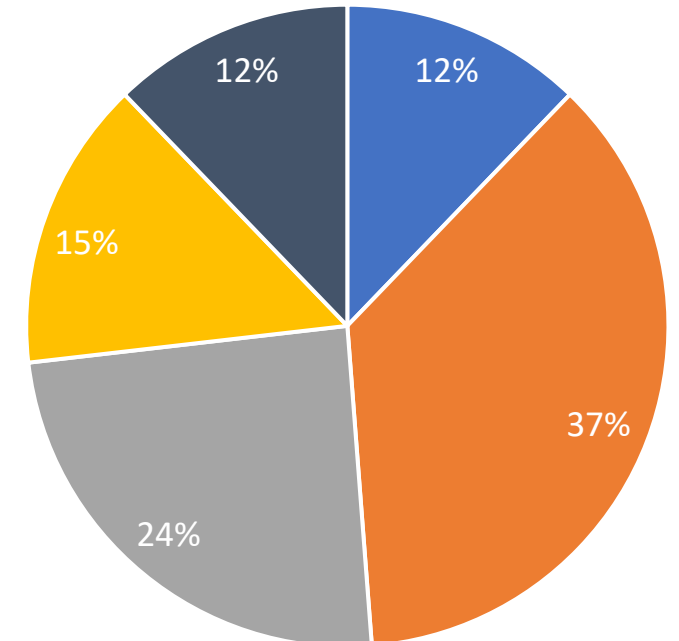
After One Month



After Three Months

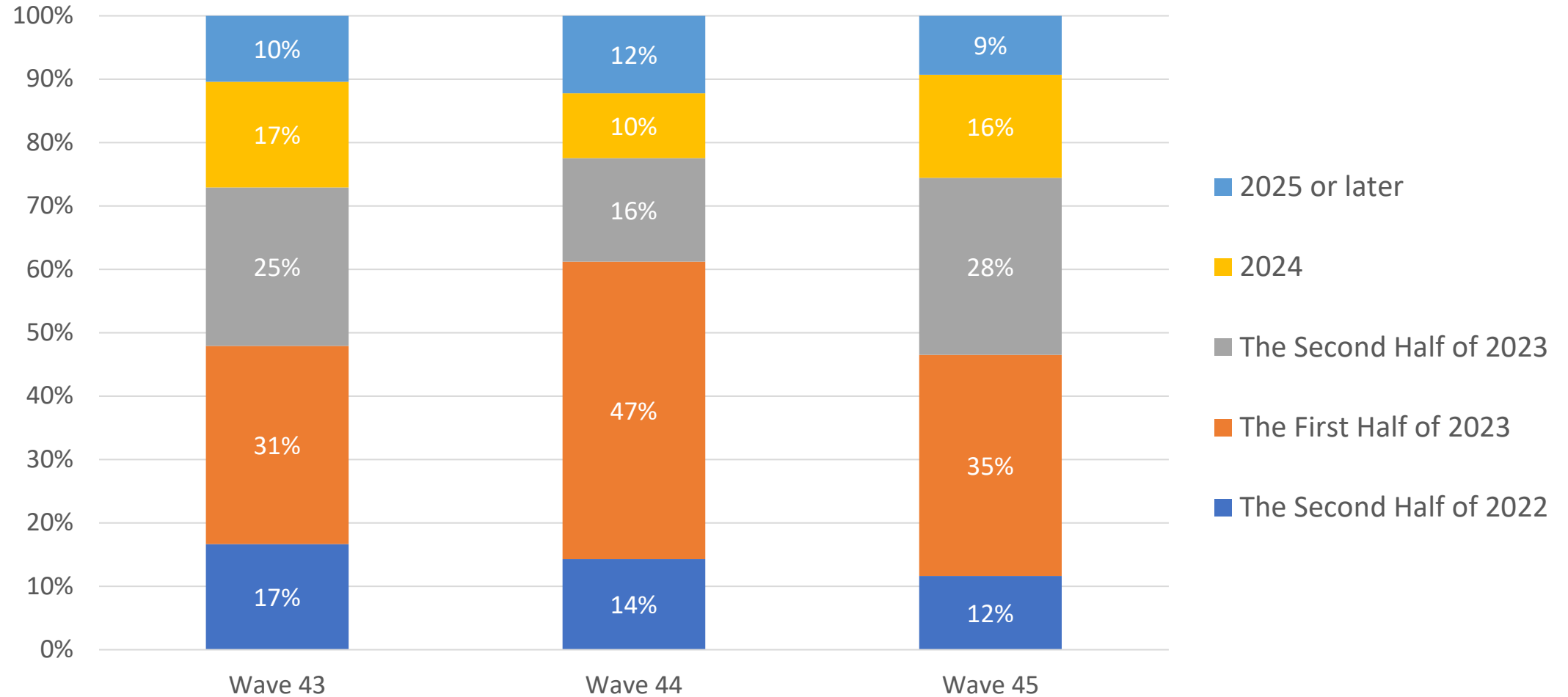


After Twelve Months



Wave 45 responses were collected from August 22 to September 18, 2022
Source: NIC Executive Survey Insights

Organization Anticipates Staffing Challenges Will Improve In... Waves 43-45



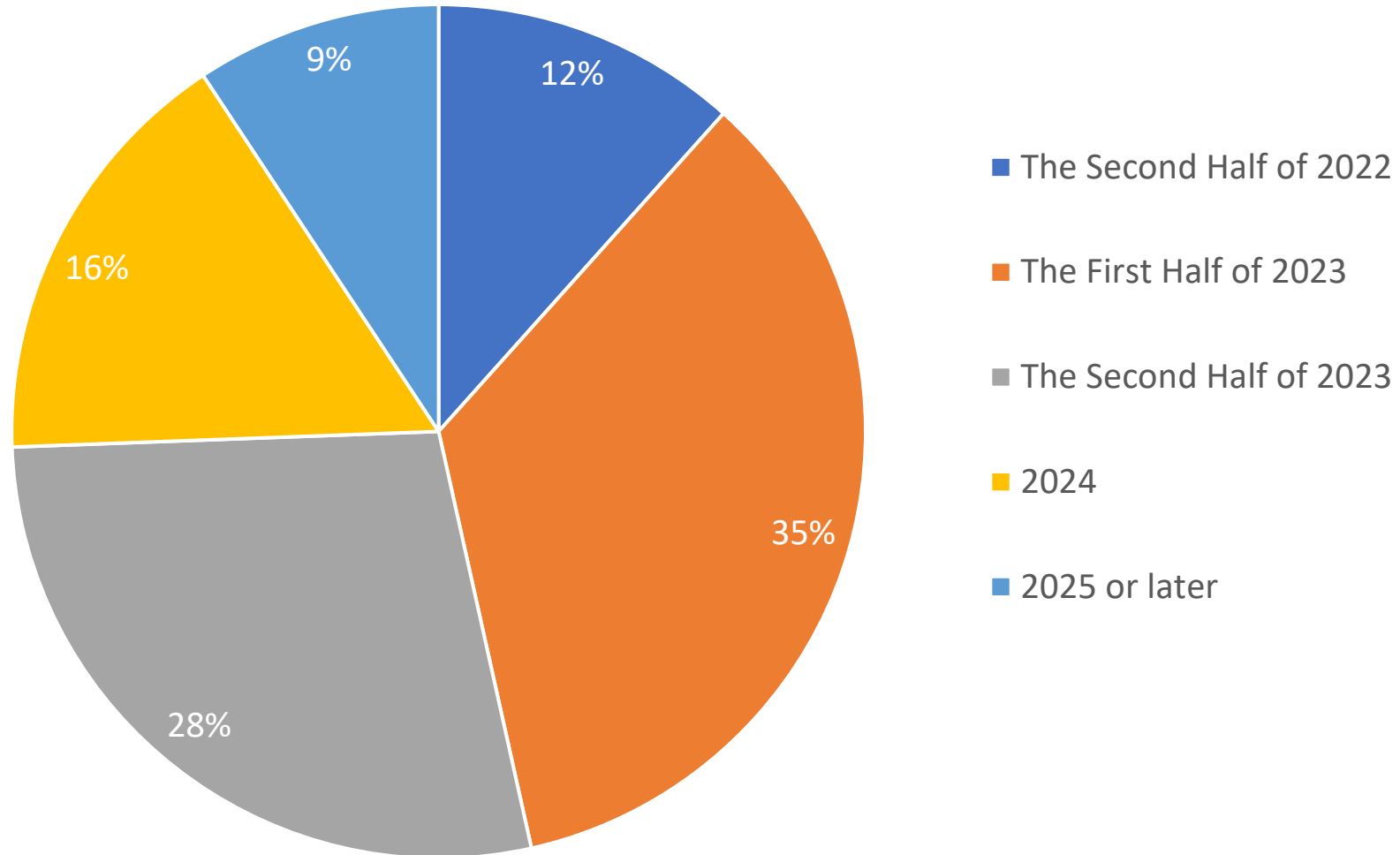
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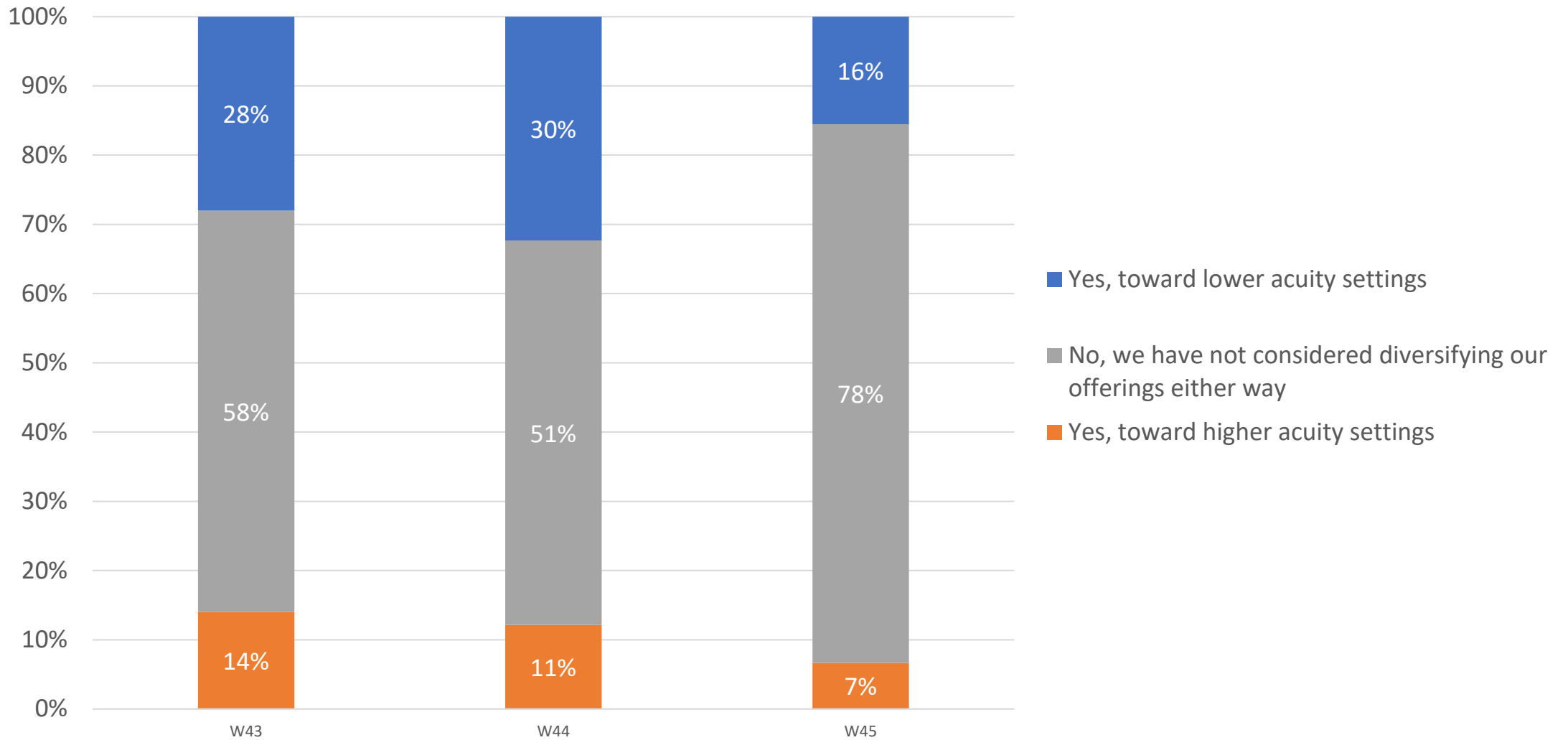
Source: NIC Executive Survey Insights

Organization Anticipates Staffing Challenges Will Improve In... ESI Wave 45



*Wave 45 responses were collected from August 22 to September 18, 2022
Source: NIC Executive Survey Insights*

Organizations Considering Diversifying Their Product Waves 43-45



Wave 43 responses were collected from June 27 to July 24, 2022

Wave 44 responses were collected from July 25 to August 21, 2022

Wave 45 responses were collected from August 22 to September 18, 2022

Source: NIC Executive Survey Insights

DEMOGRAPHICS

Demographics – W45

47 responses received

Types of properties owned/operated

- 66% Seniors Housing (IL/AL/MC)
- 21% Nursing Care
- 45% CCRC

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

PROFIT STATUS:

FP: 49%

NFP: 45%

Both: 6%

SIZE:

1 to 10: 66%

11 to 25: 21%

26+: 13%