

Executive Survey Insights

Wave 46:

September 19 to October 16, 2022

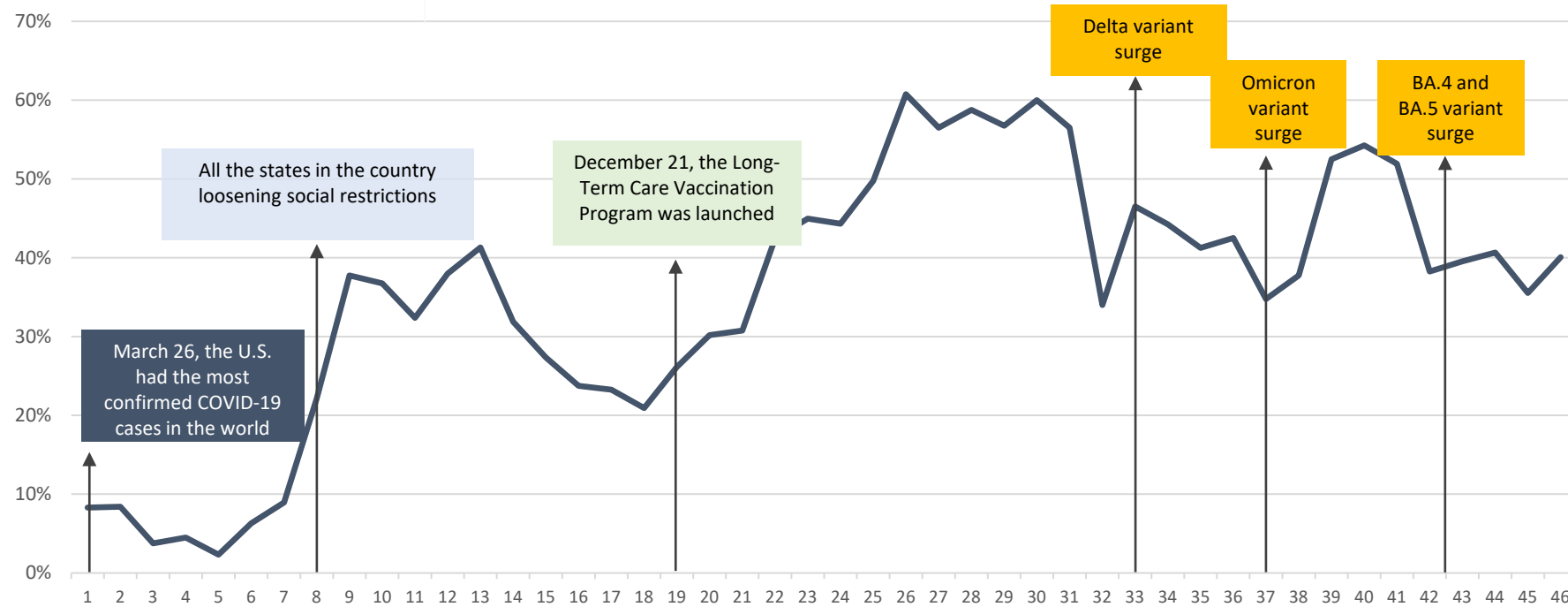
- Report Graphs
 - Pace of Move-Ins and Move-Outs
 - Rent Concessions
 - Resident Acuity at Move-In
 - Severity of Staffing Shortages
 - Property & Professional Liability Insurance
 - Organizations' Biggest Challenges

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
- Wave 46: 9/19 to 10/16

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



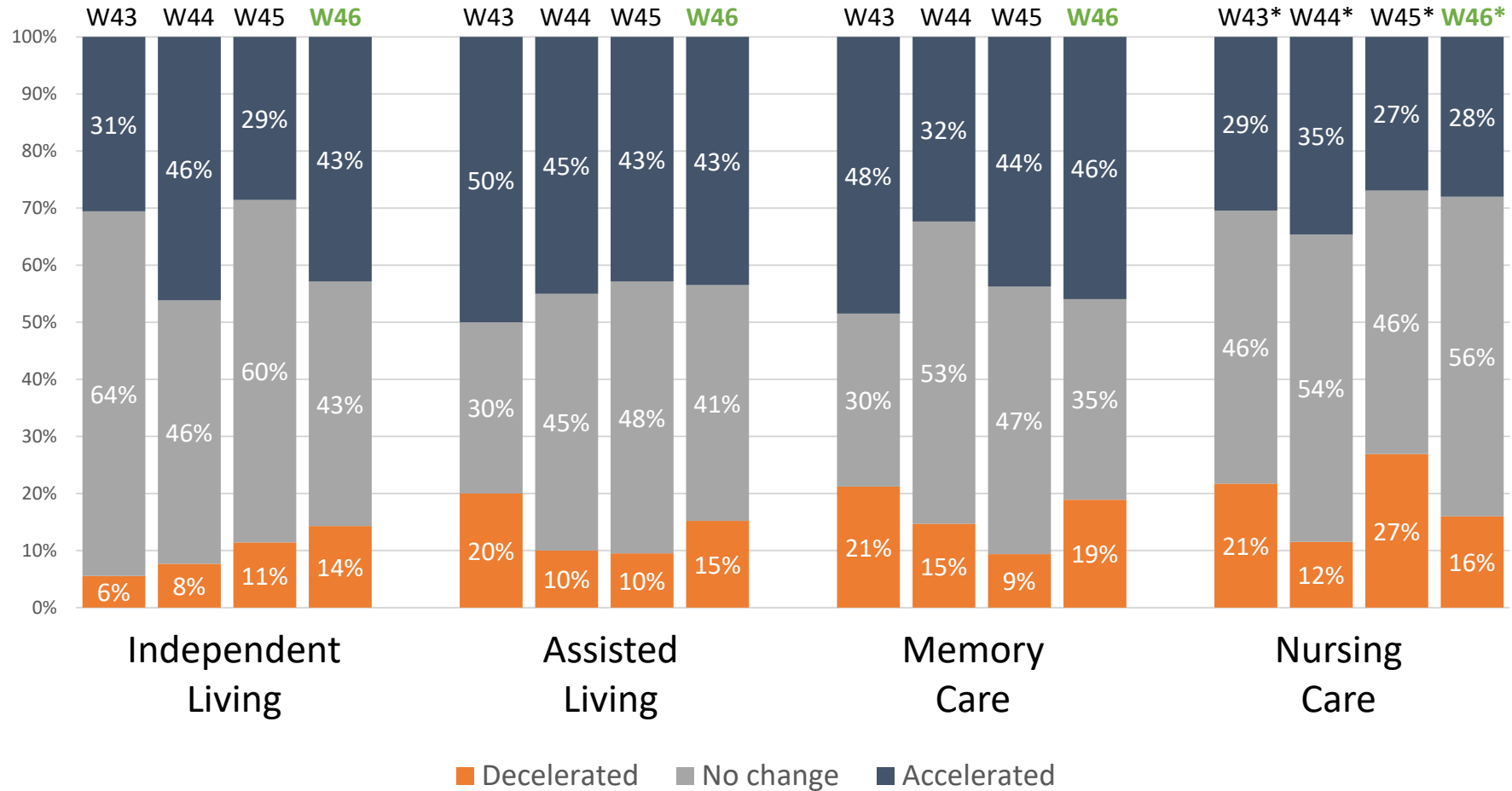
March 24, 2020

October 16, 2022

*Average of IL/AL/MC/NC

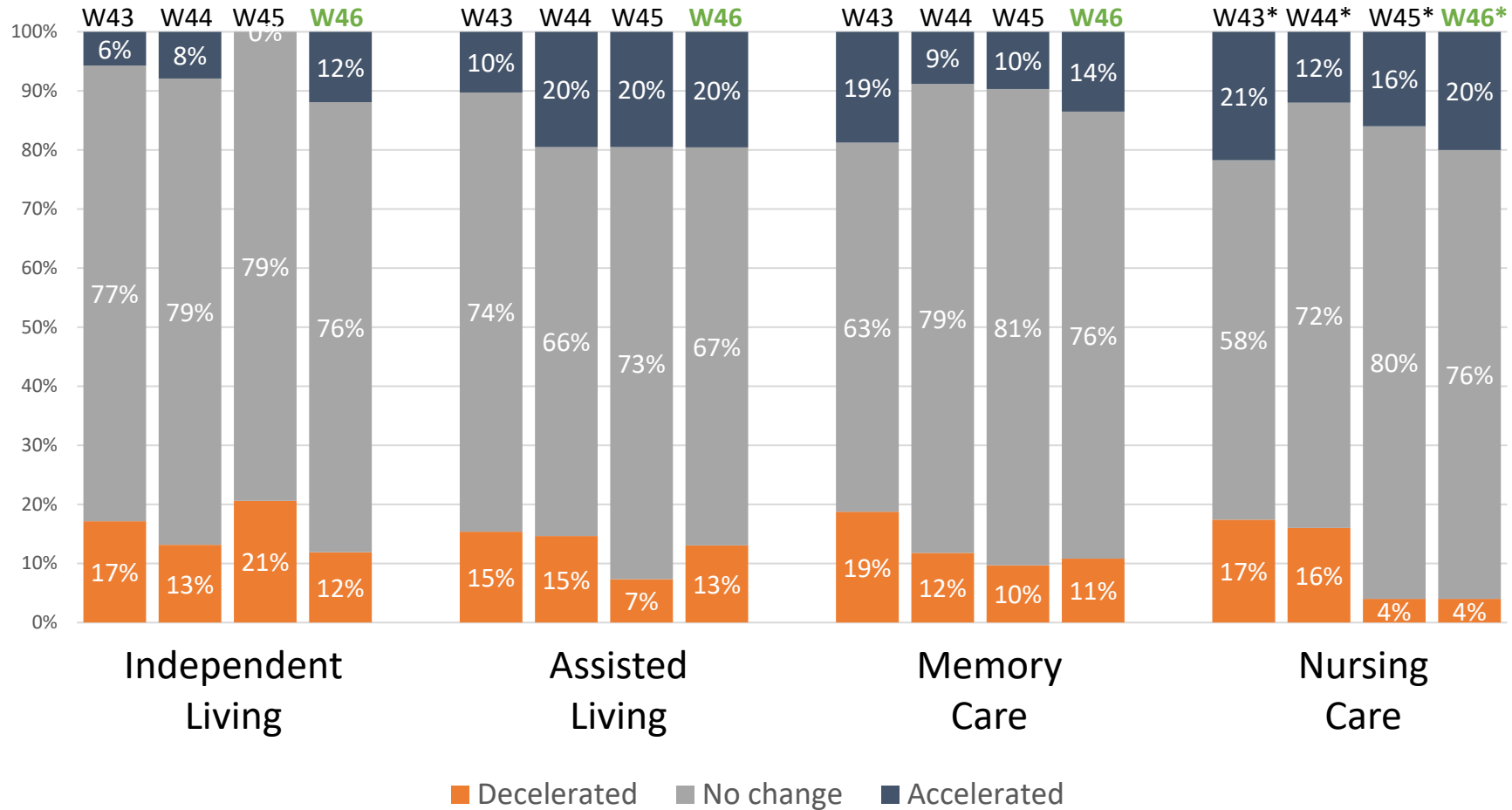
Source: NIC Executive Survey Insights

Pace of Move-Ins in Past 30 Days ESI Waves 43-46



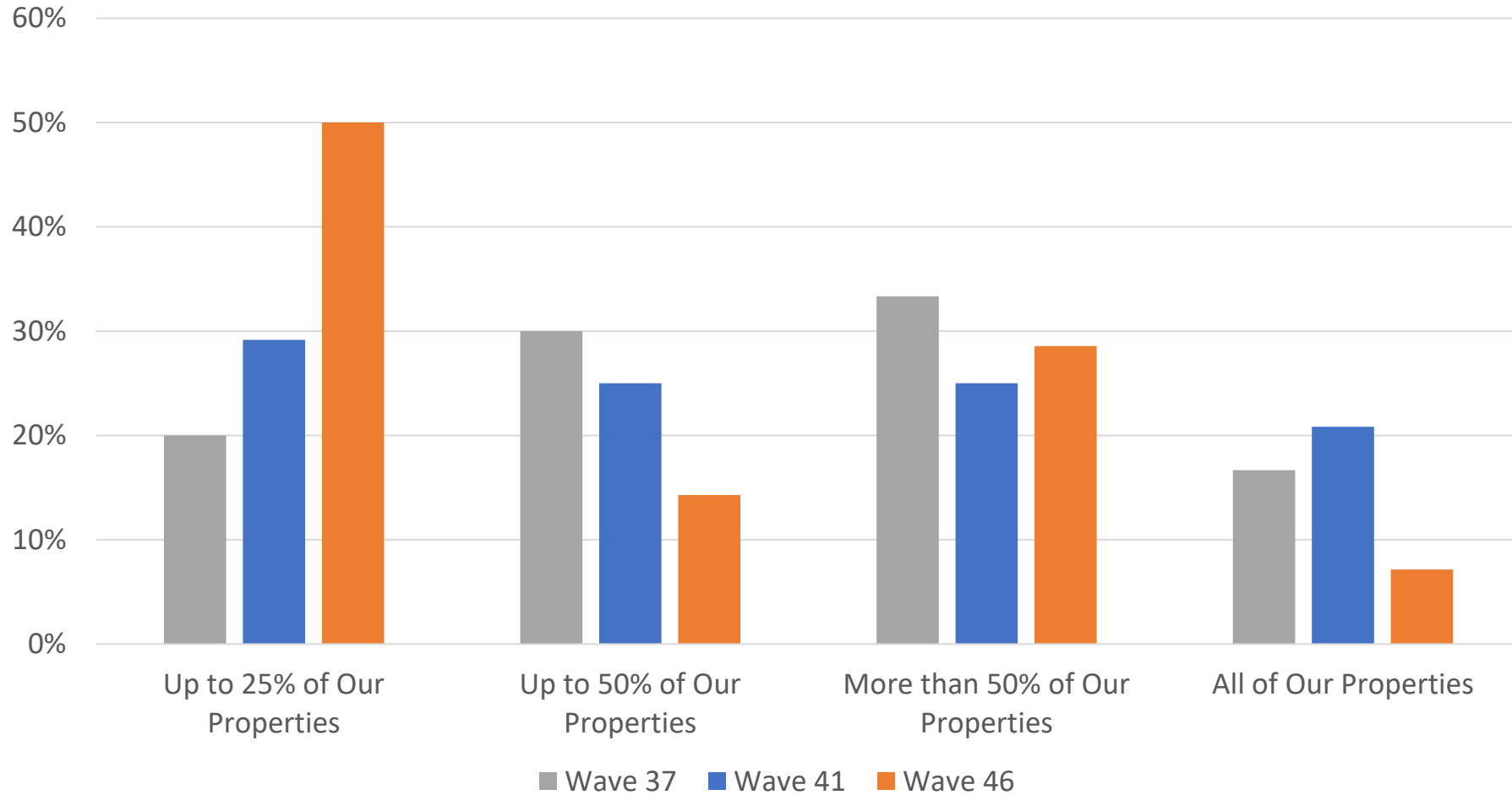
Wave 43 responses were collected from June 27 to July 24, 2022
 Wave 44 responses were collected from July 25 to August 21, 2022
 Wave 45 responses were collected from August 22 to September 18, 2022
 Wave 46 responses were collected from September 19 to October 16, 2022
 Source: NIC Executive Survey Insights
 *Sample size <30

Pace of Move-Outs in Past 30 Days ESI Waves 43-46



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
 Wave 46 responses were collected from September 19 to October 16, 2022
 Source: NIC Executive Survey Insights
 *Sample size <30

Share of Properties Offering Rent Concessions ESI Waves 37, 41, and 46



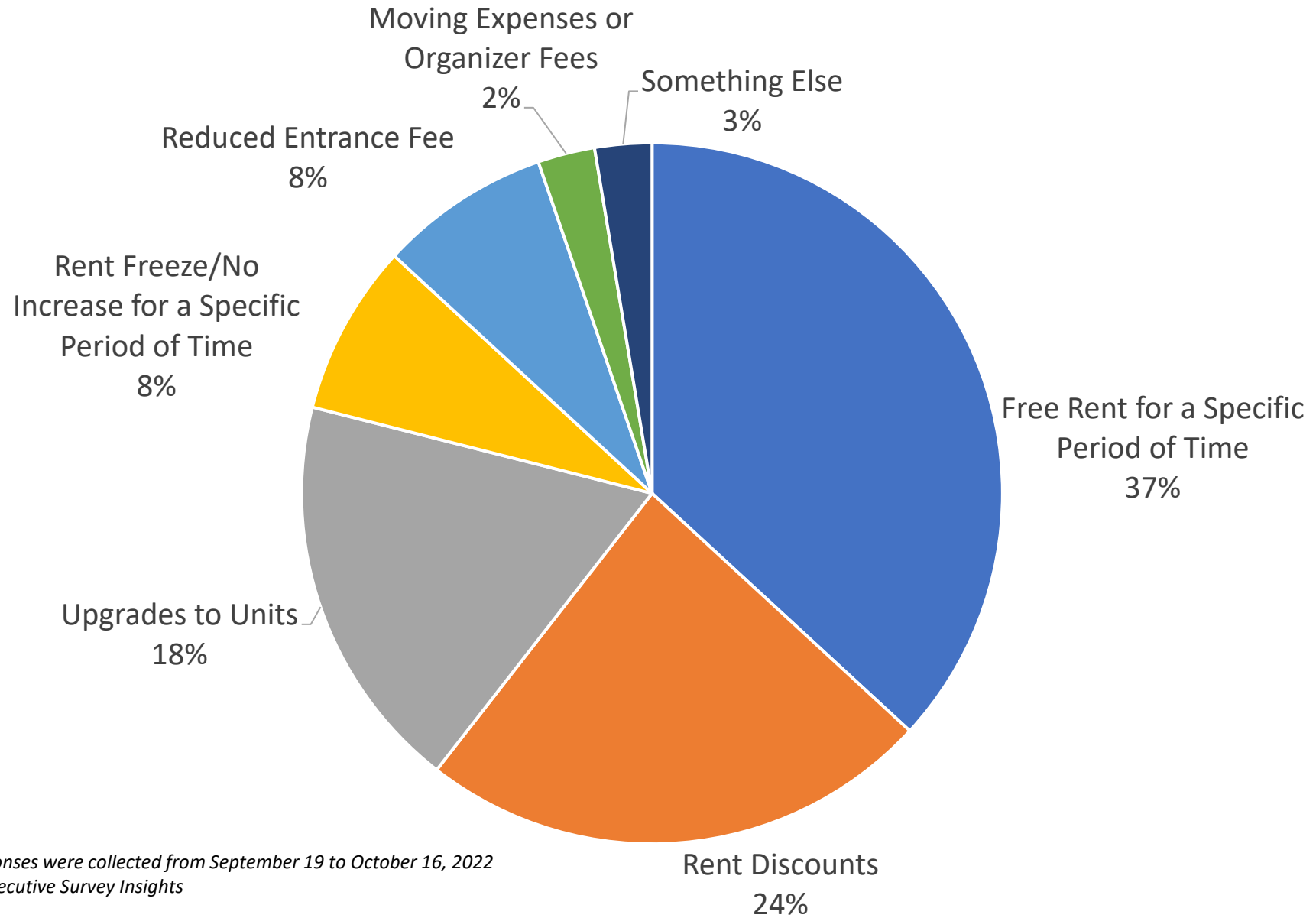
Wave 37 responses were collected from January 10 to February 6, 2022

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

Wave 46 responses were collected from September 19 to October 16, 2022

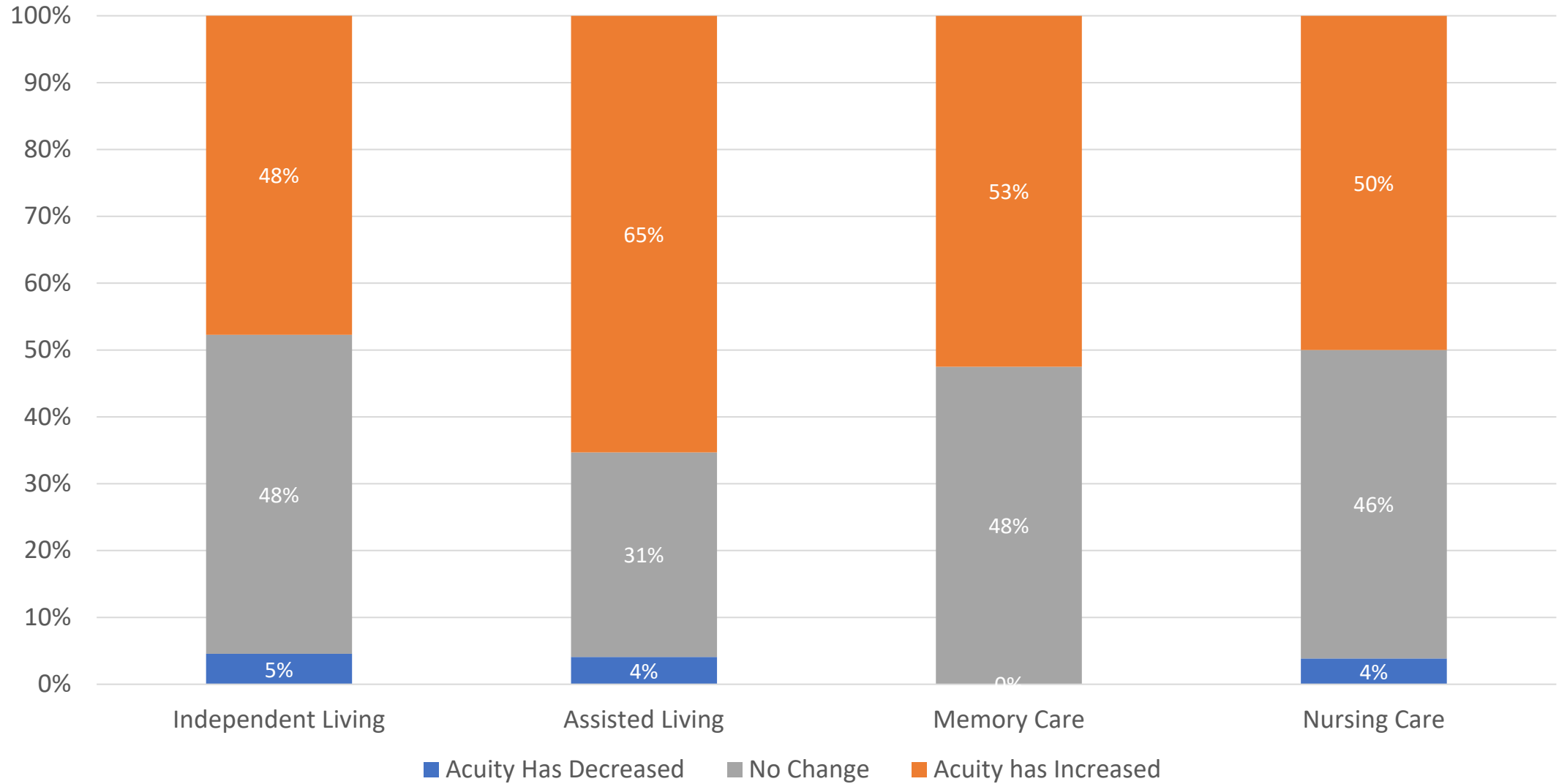
Source: NIC Executive Survey Insights

Type of Rent Concession Offered ESI Wave 46



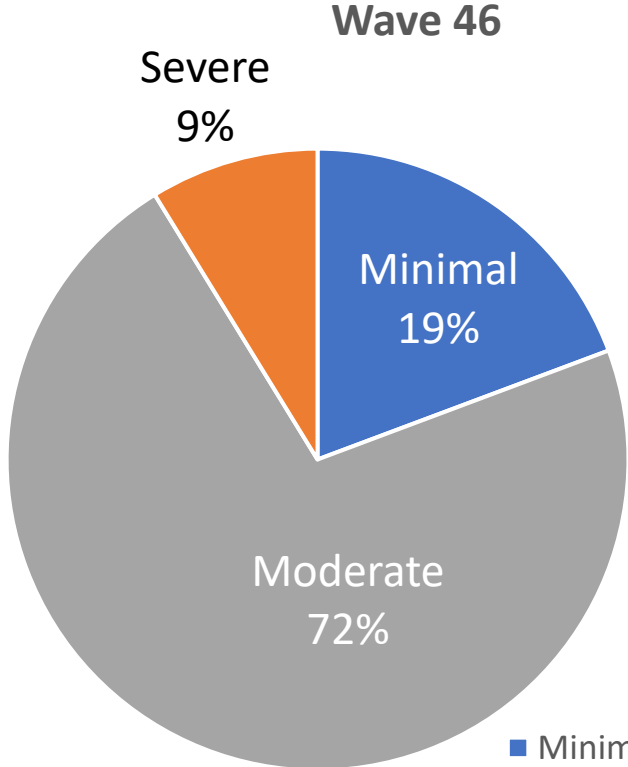
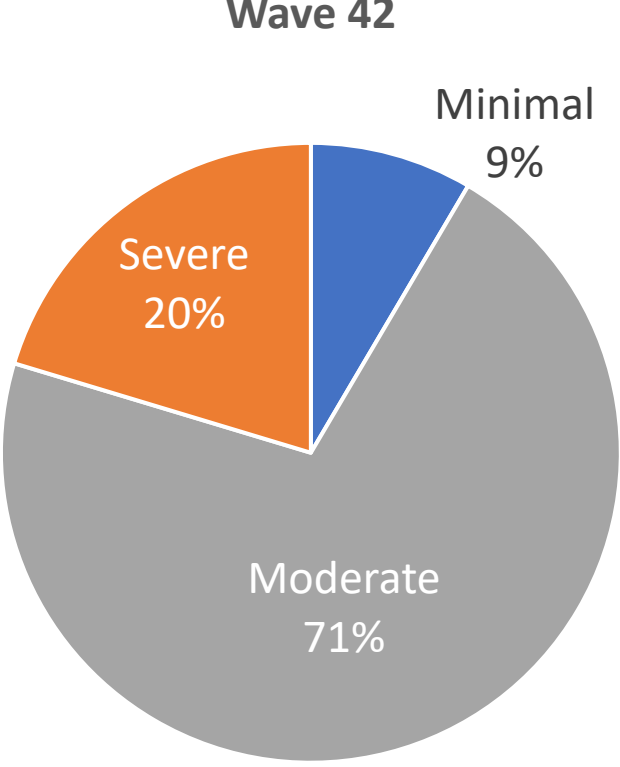
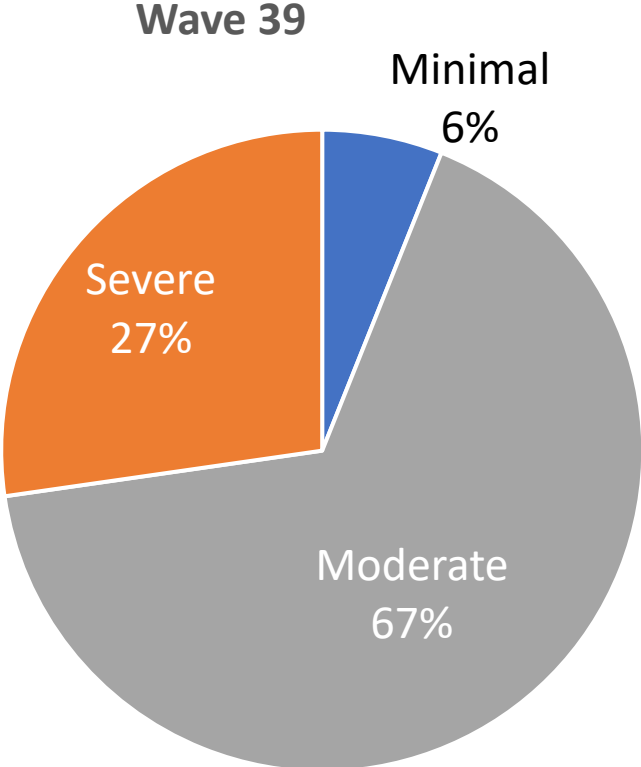
Wave 46 responses were collected from September 19 to October 16, 2022
Source: NIC Executive Survey Insights

Resident Acuity at Move-In Compared to Pre-Pandemic ESI Wave 46



Wave 46 responses were collected from September 19 to October 16, 2022
Source: NIC Executive Survey Insights

Severity of Staffing Shortages ESI Wave 39 vs. 42 vs. 46

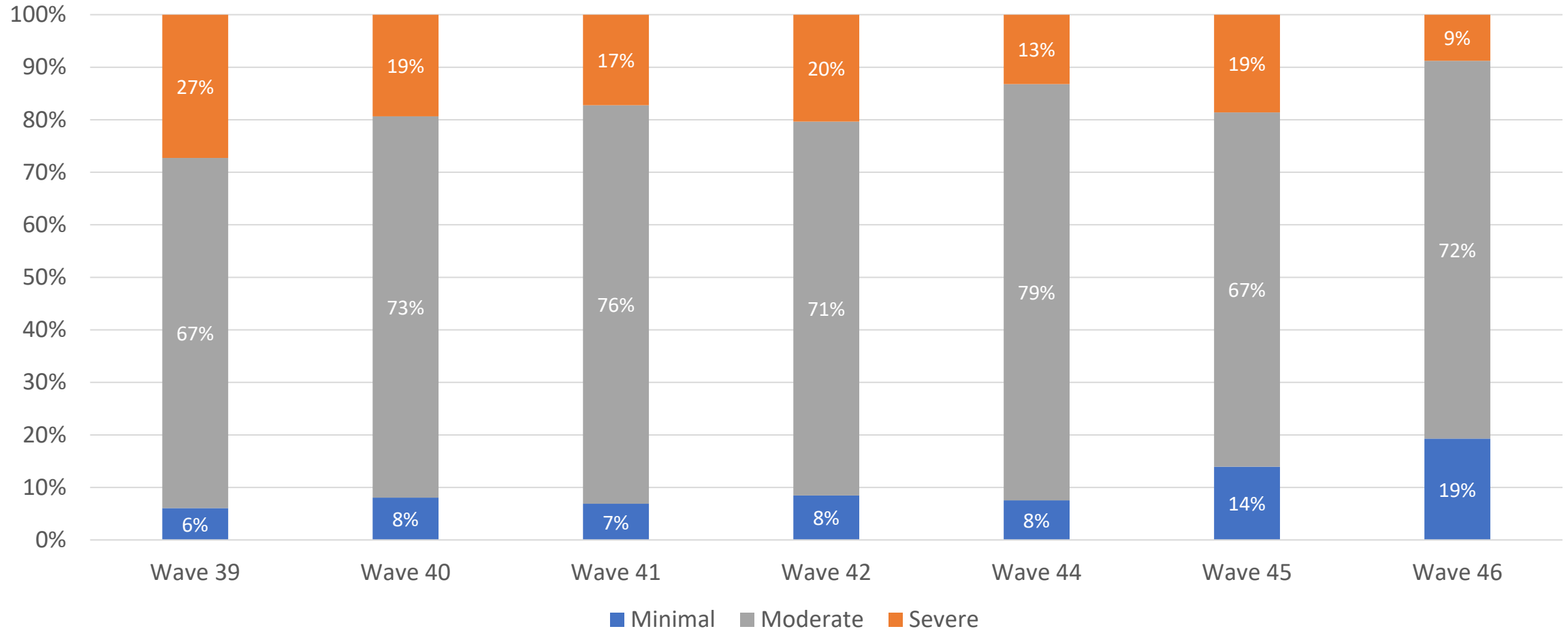


- Minimal
- Moderate
- Severe

Wave 39 responses were collected from March 7 to April 3, 2022
Wave 42 responses were collected from May 31 to June 26, 2022
Wave 46 responses were collected from September 19 to October 16, 2022
Source: NIC Executive Survey Insights

Severity of Staffing Shortages

ESI Waves 39-42, 44-46



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

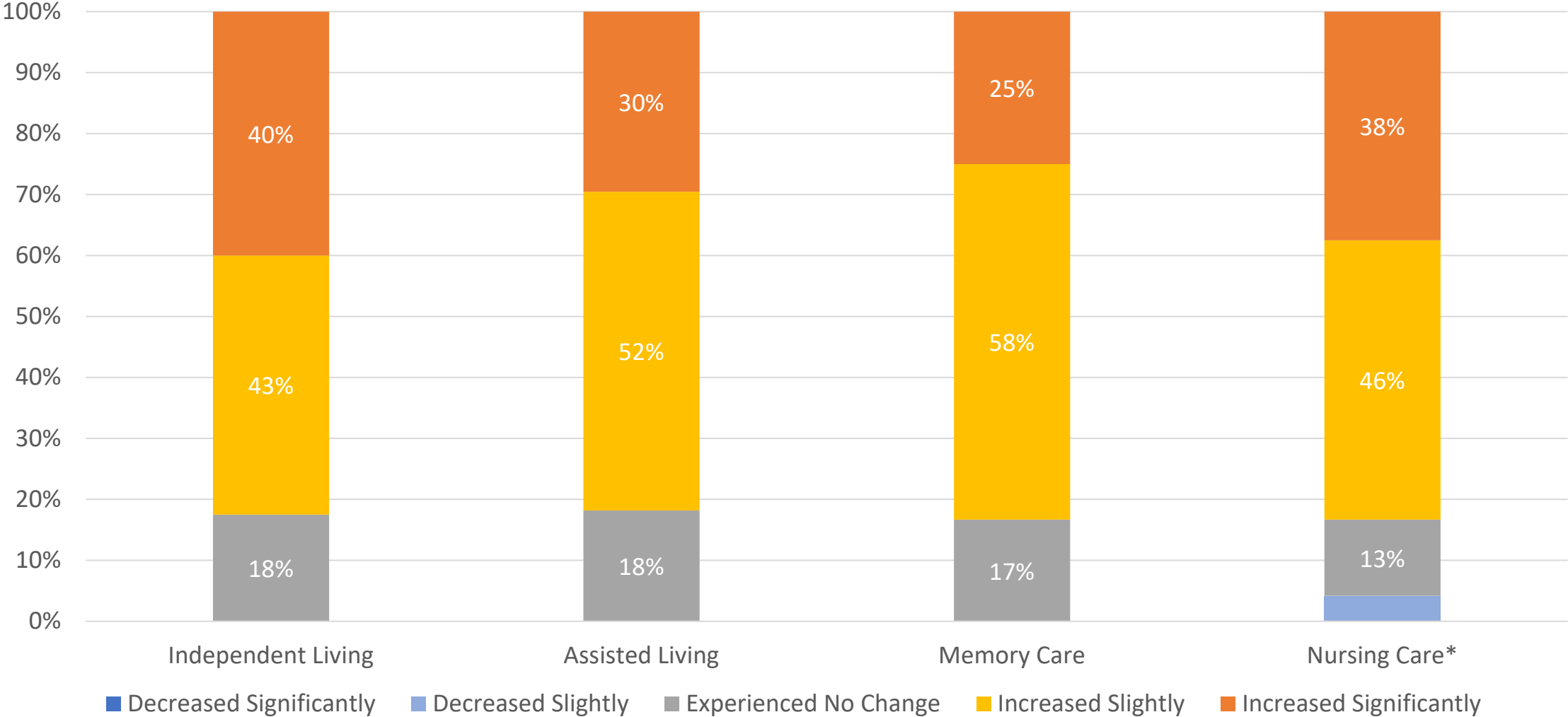
Wave 44 responses were collected from July 25 to August 21, 2022

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

Wave 46 responses were collected from September 19 to October 16, 2022

Source: NIC Executive Survey Insights

Change in Cost of Property Insurance, Compared to Pre-Pandemic ESI Wave 46

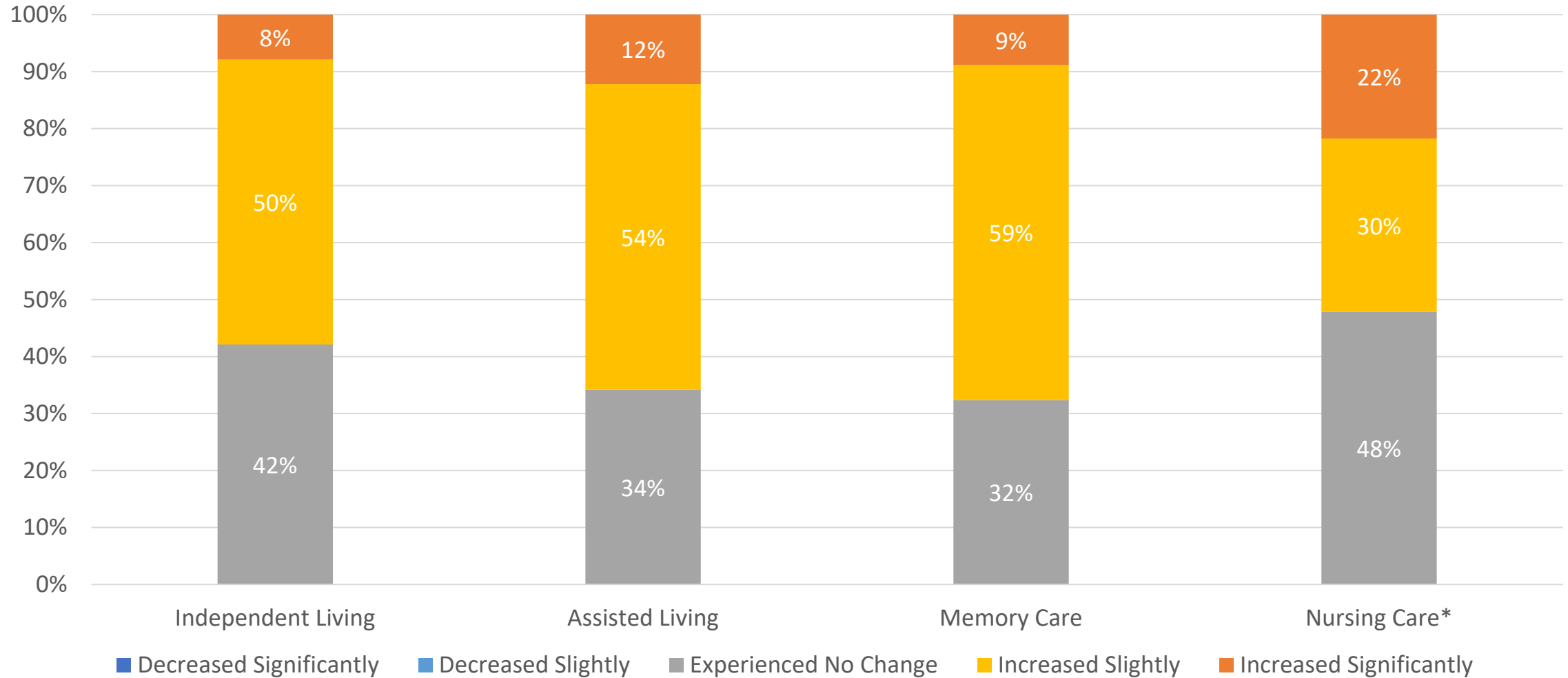


Wave 46 responses were collected from September 19 to October 16, 2022

Source: NIC Executive Survey Insights

*Sample size <30

Change in Cost of Professional Liability Insurance, Compared to Pre-Pandemic ESI Wave 46



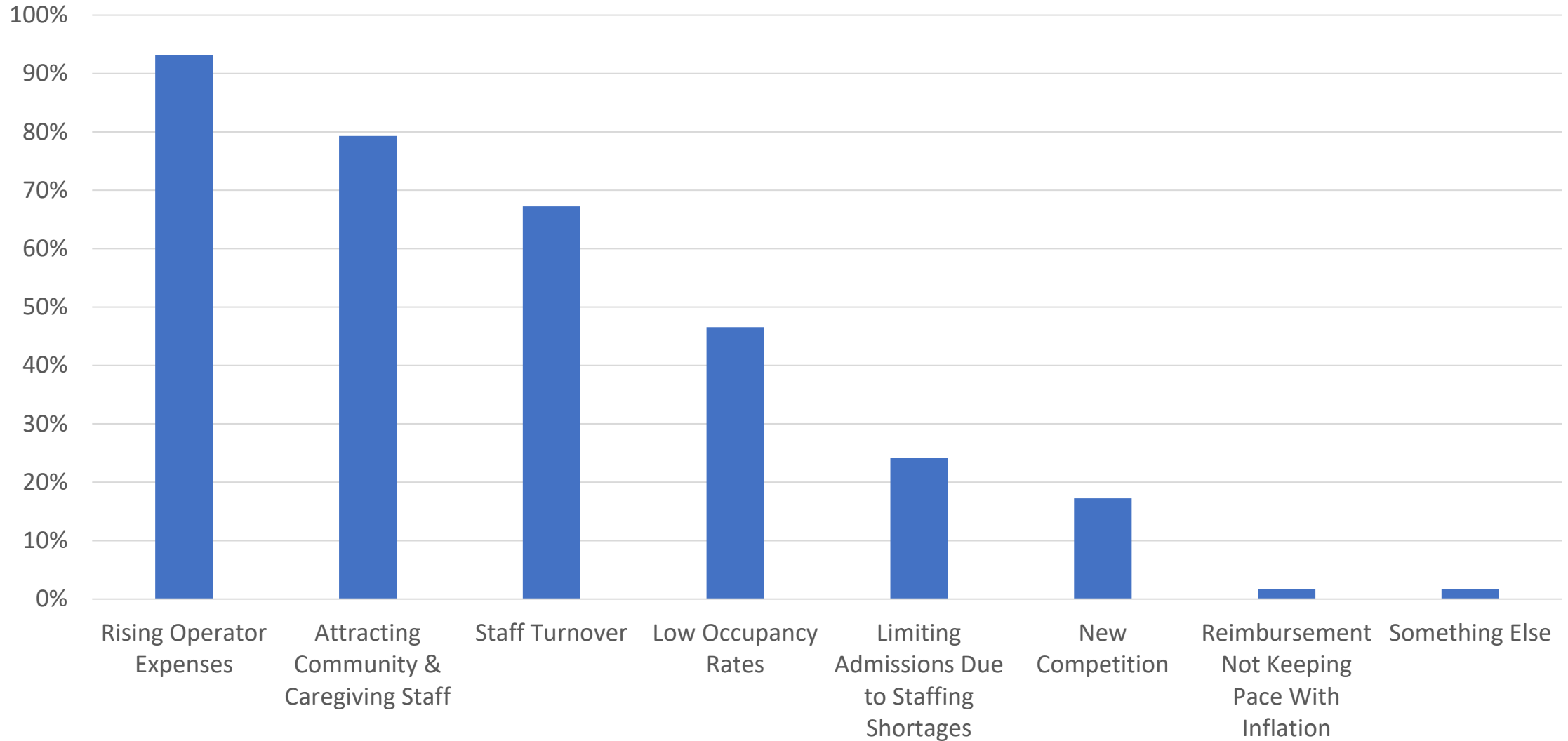
Wave 46 responses were collected from September 19 to October 16, 2022

Source: NIC Executive Survey Insights

*Sample size <30

The Biggest Challenges Currently Facing my Organization

ESI Wave 46



Wave 46 responses were collected from September 19 to October 16, 2022

Source: NIC Executive Survey Insights

*Sample size <30

Demographics – Wave 46

58 responses received

Types of properties owned/operated

- 79% Seniors Housing (IL/AL/MC)
- 22% Nursing Care
- 34% CCRC

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

PROFIT STATUS:

FP: 40%

NFP: 36%

Both: 5%

SIZE:

1 to 10: 64%

11 to 25: 19%

26+: 17%