



Executive Survey Insights

Wave 47:

October 17 to November 13, 2022

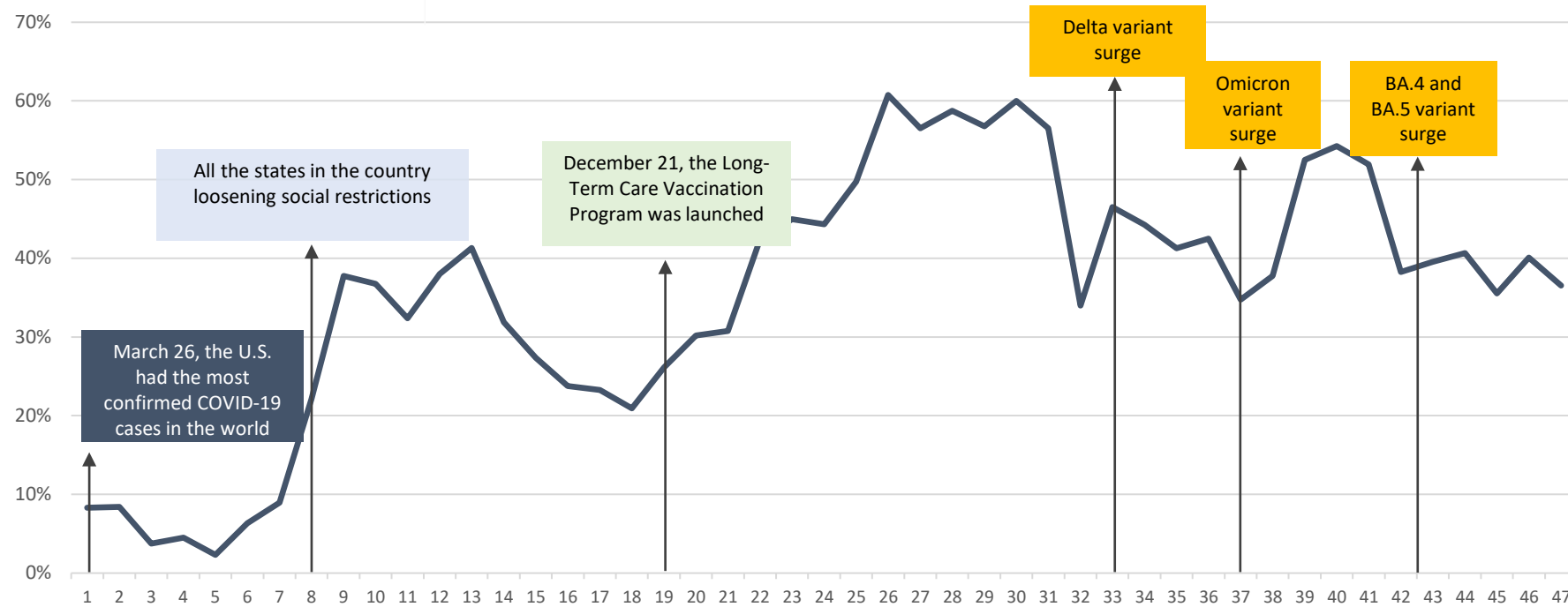
- Report Graphs
 - Pace of Move-Ins and Move-Outs
 - Organizations' Biggest Challenges
 - Development Pipeline Expectations
 - Product Diversification Considerations
 - Care Segment Changes Within Portfolio of Properties
 - Demographics

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
- Wave 47: 10/17 to 11/13

Organizations Reporting an Increase in the Pace of Move-Ins*



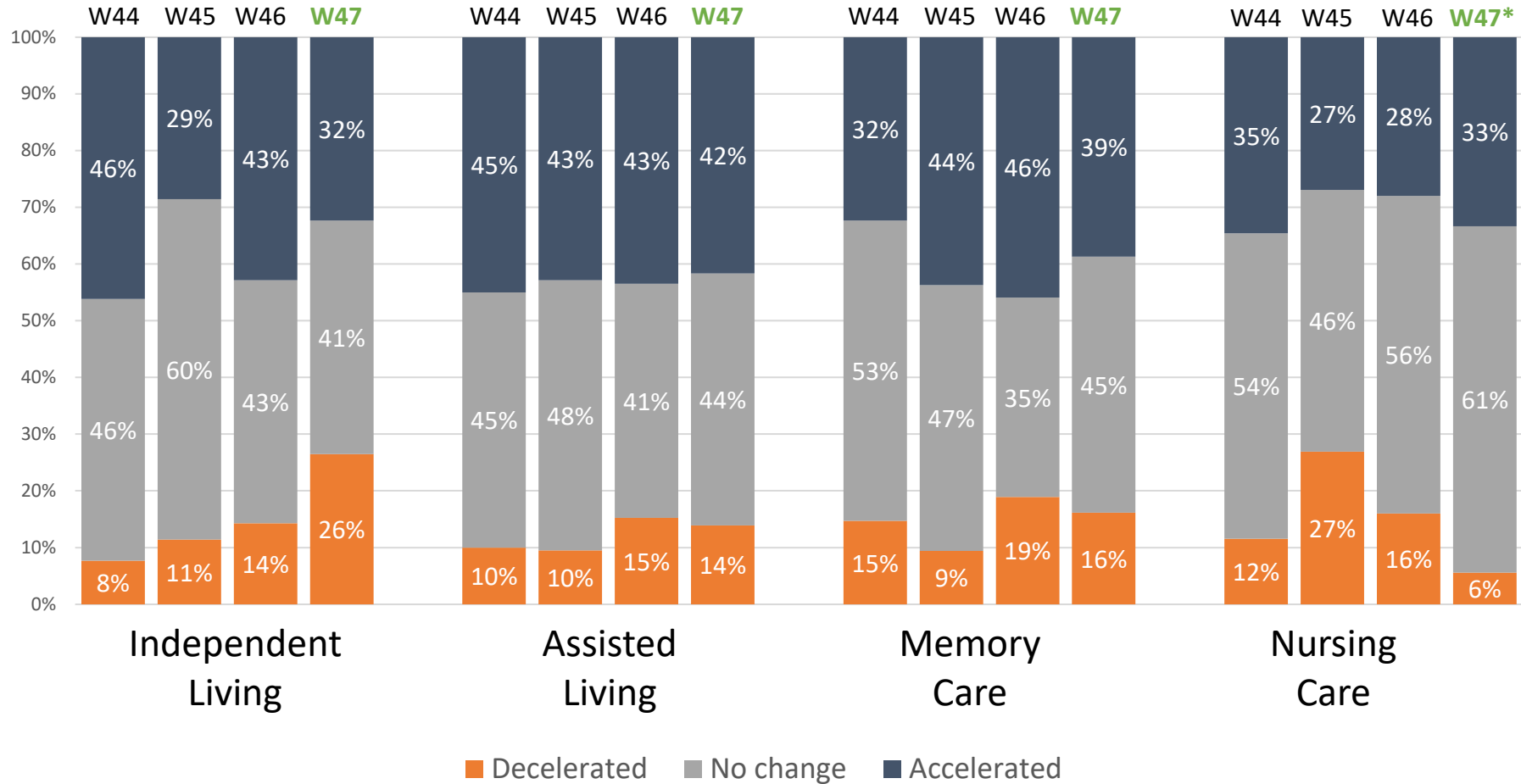
March 24, 2020

November 13, 2022

*Average of IL/AL/MC/NC

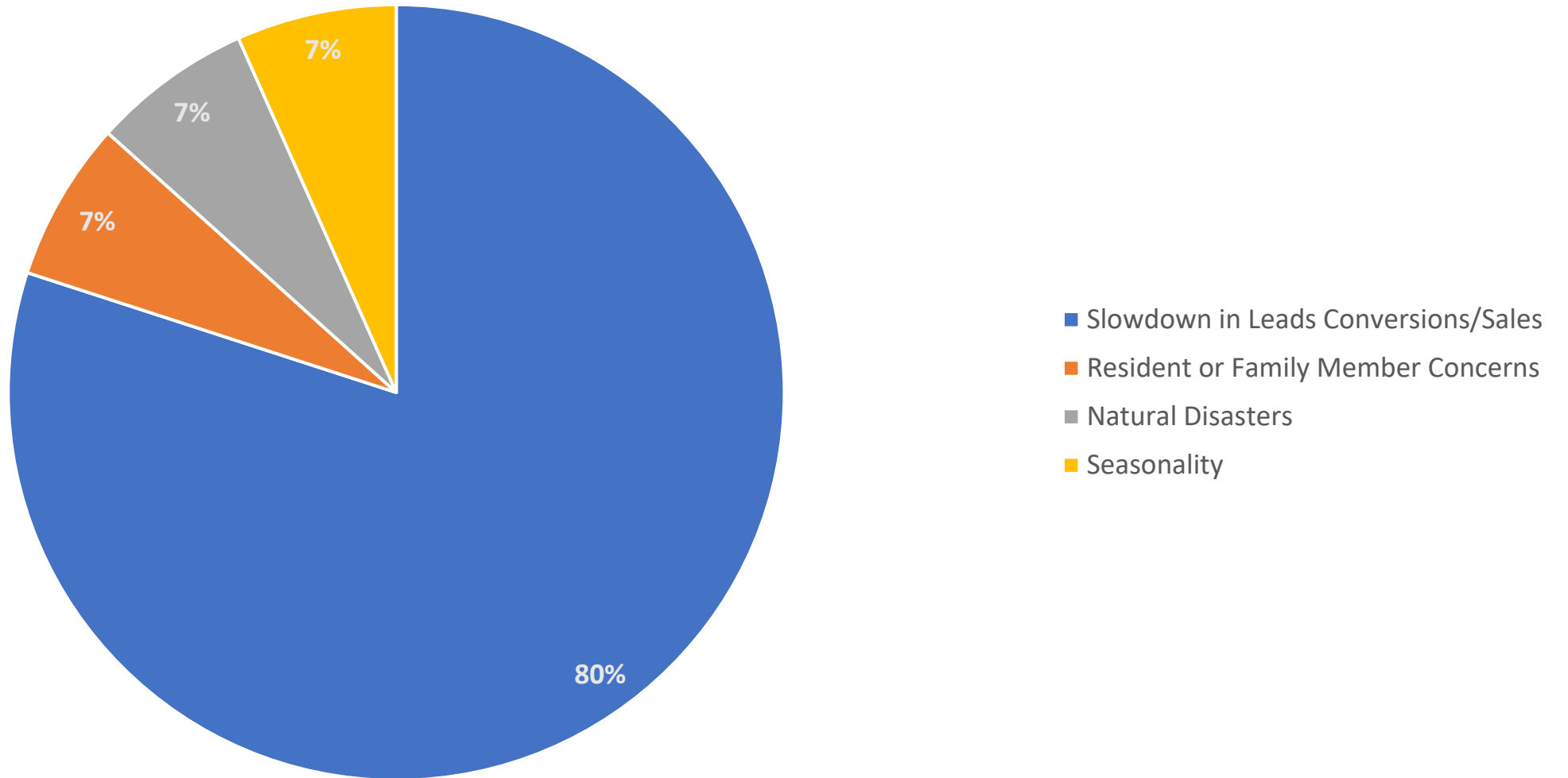
Source: NIC Executive Survey Insights

Pace of Move-Ins in Past 30 Days ESI Waves 44-47



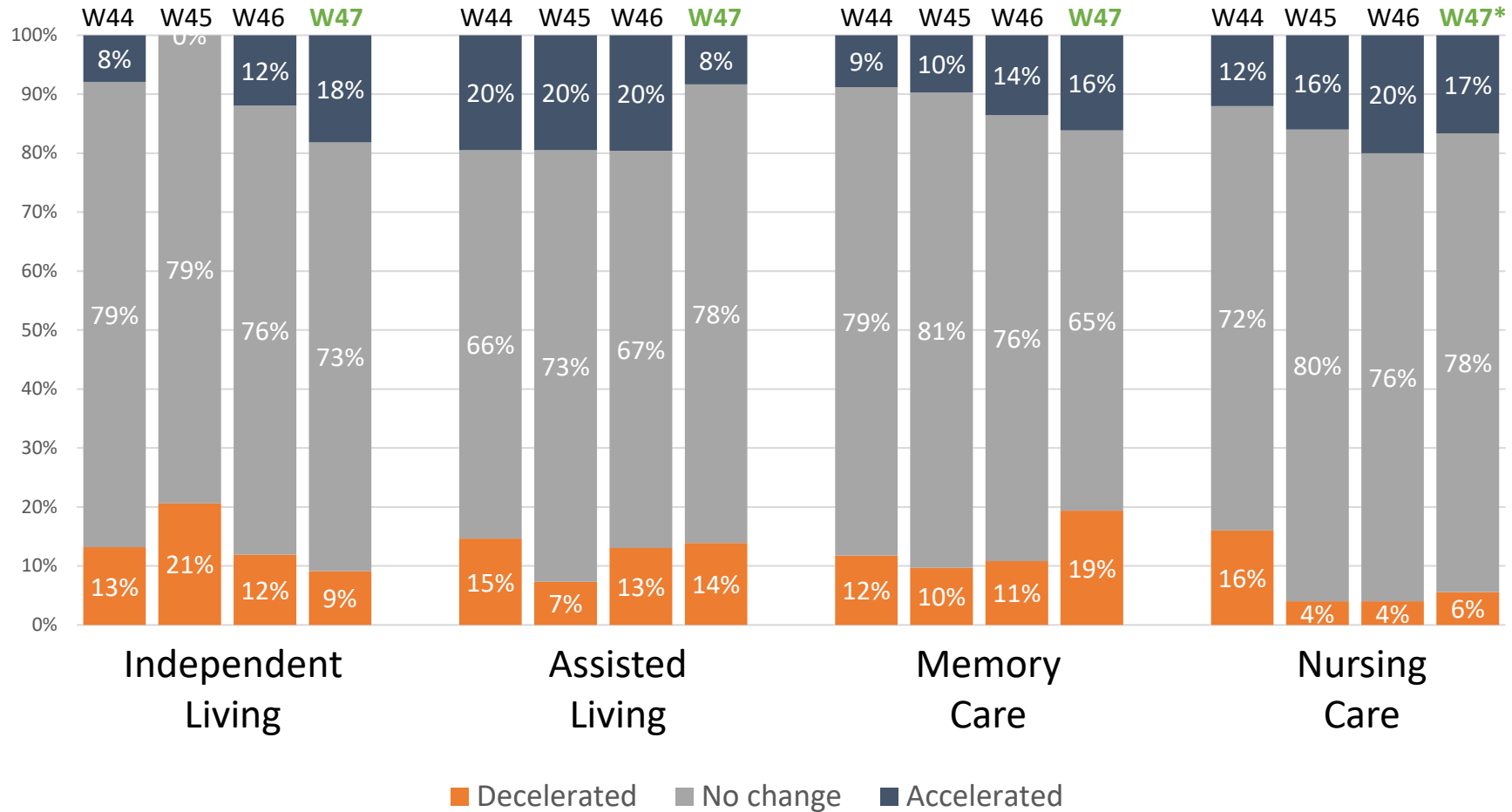
Wave 44 responses were collected from July 25 to August 21, 2022
 Wave 45 responses were collected from August 22 to September 18, 2022
 Wave 46 responses were collected from September 19 to October 16, 2022
 Wave 47 responses were collected from October 17 to November 13, 2022
 Source: NIC Executive Survey Insights
 *Sample size <25

Cause of Deceleration in Move-In ESI Wave 47



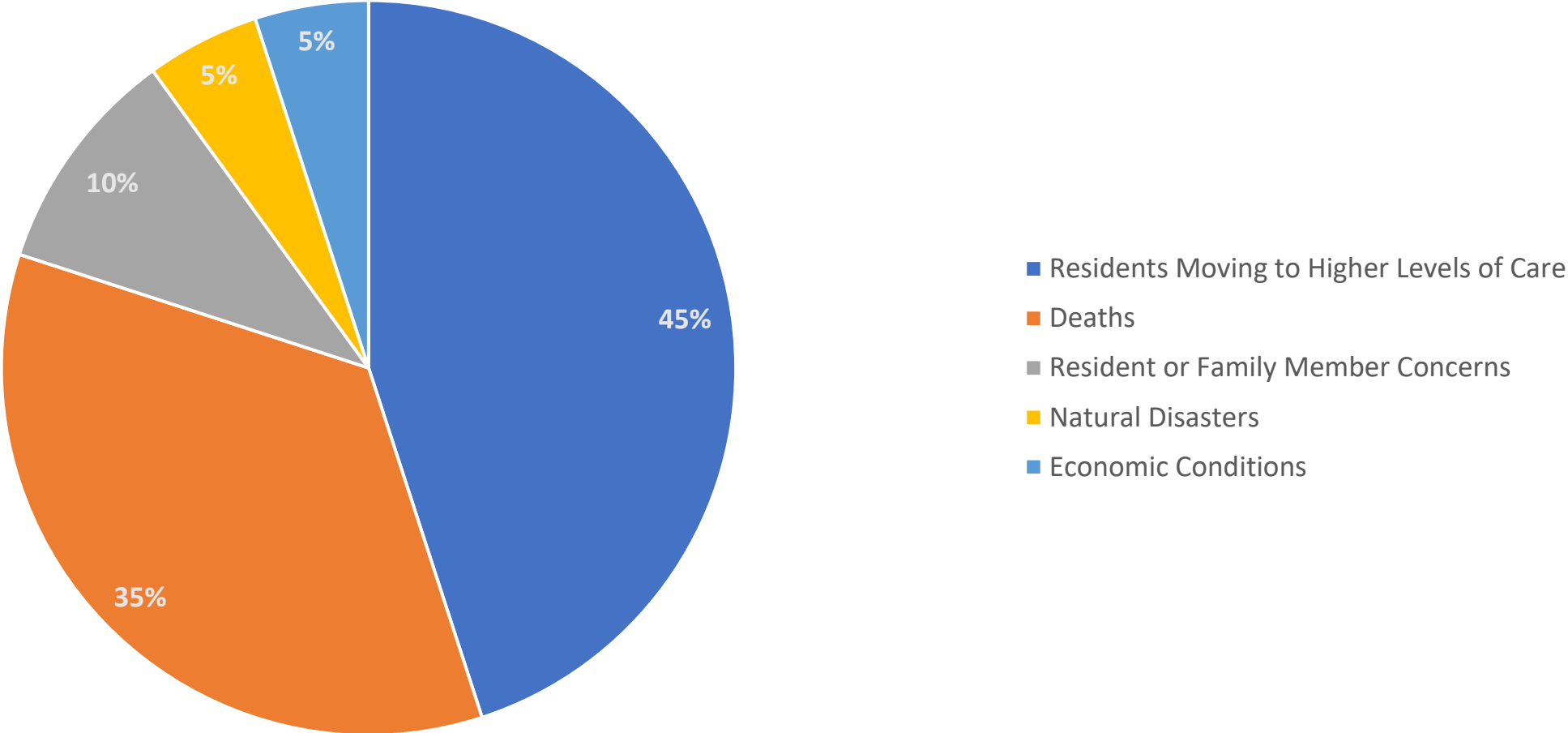
Wave 47 responses were collected from October 17 to November 13, 2022
Source: NIC Executive Survey Insights

Pace of Move-Outs in Past 30 Days ESI Waves 44-47



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
 Wave 47 responses were collected from October 17 to November 13, 2022
 Source: NIC Executive Survey Insights
 *Sample size <25

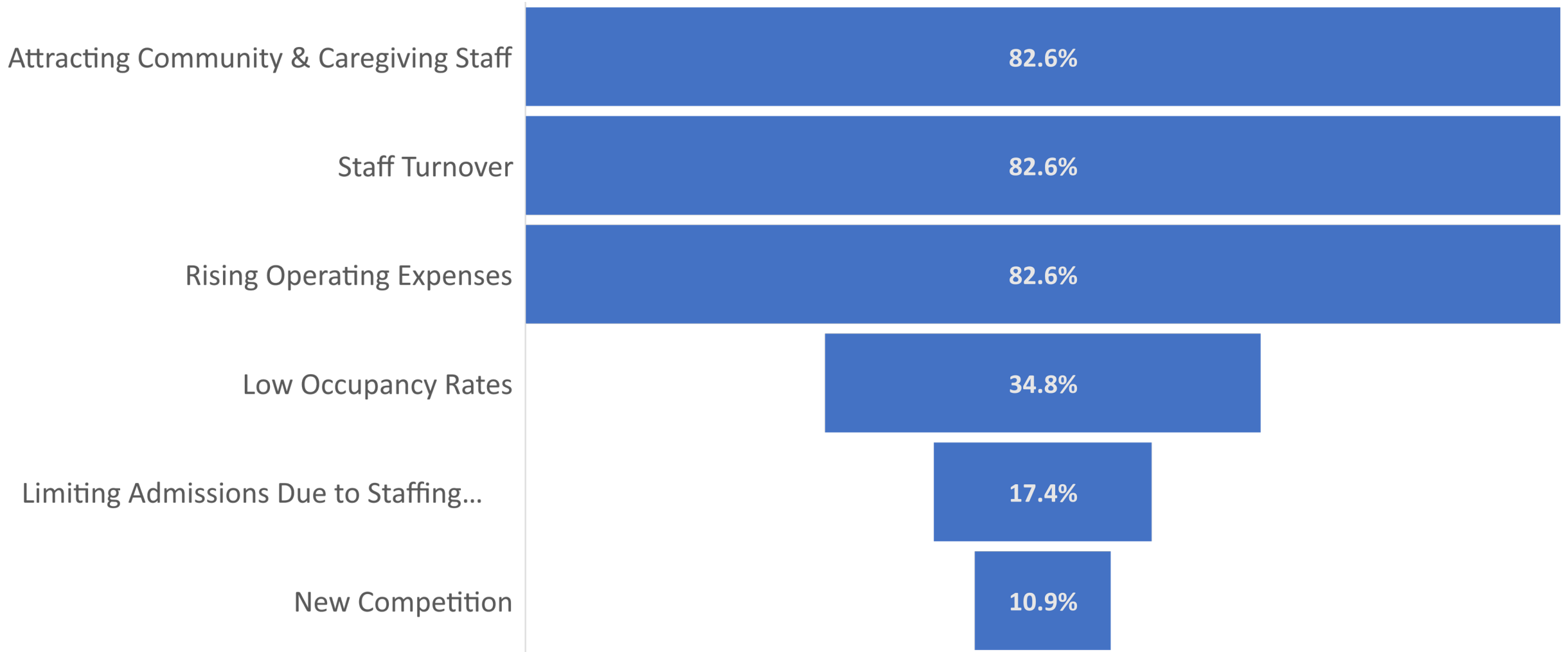
Cause of Acceleration of Move-Outs ESI Wave 47



Wave 47 responses were collected from October 17 to November 13, 2022
Source: NIC Executive Survey Insights

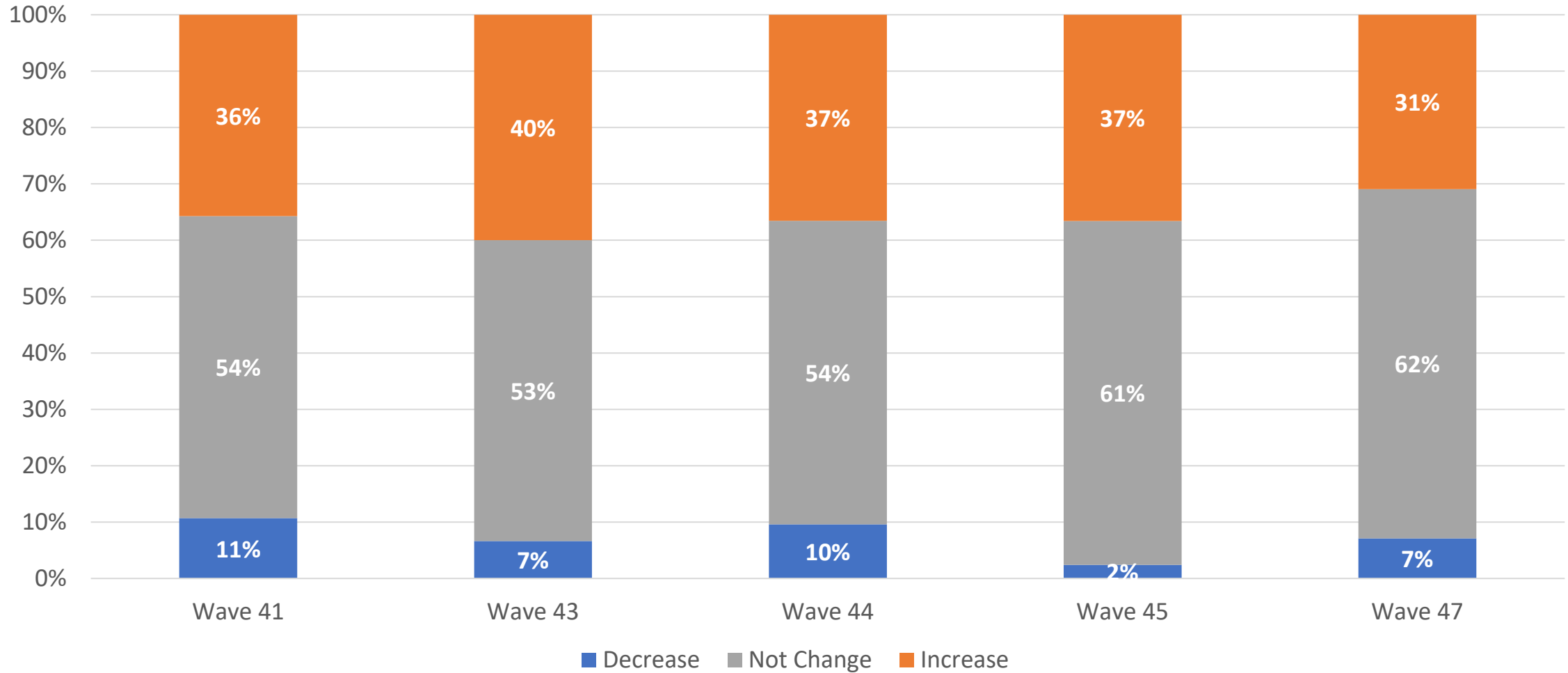
The Biggest Challenges Currently Facing my Organization

ESI Wave 47



Wave 47 responses were collected from October 17 to November 13, 2022
Source: NIC Executive Survey Insights

My Organization's Development Pipeline Expectations for the Next Year



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

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

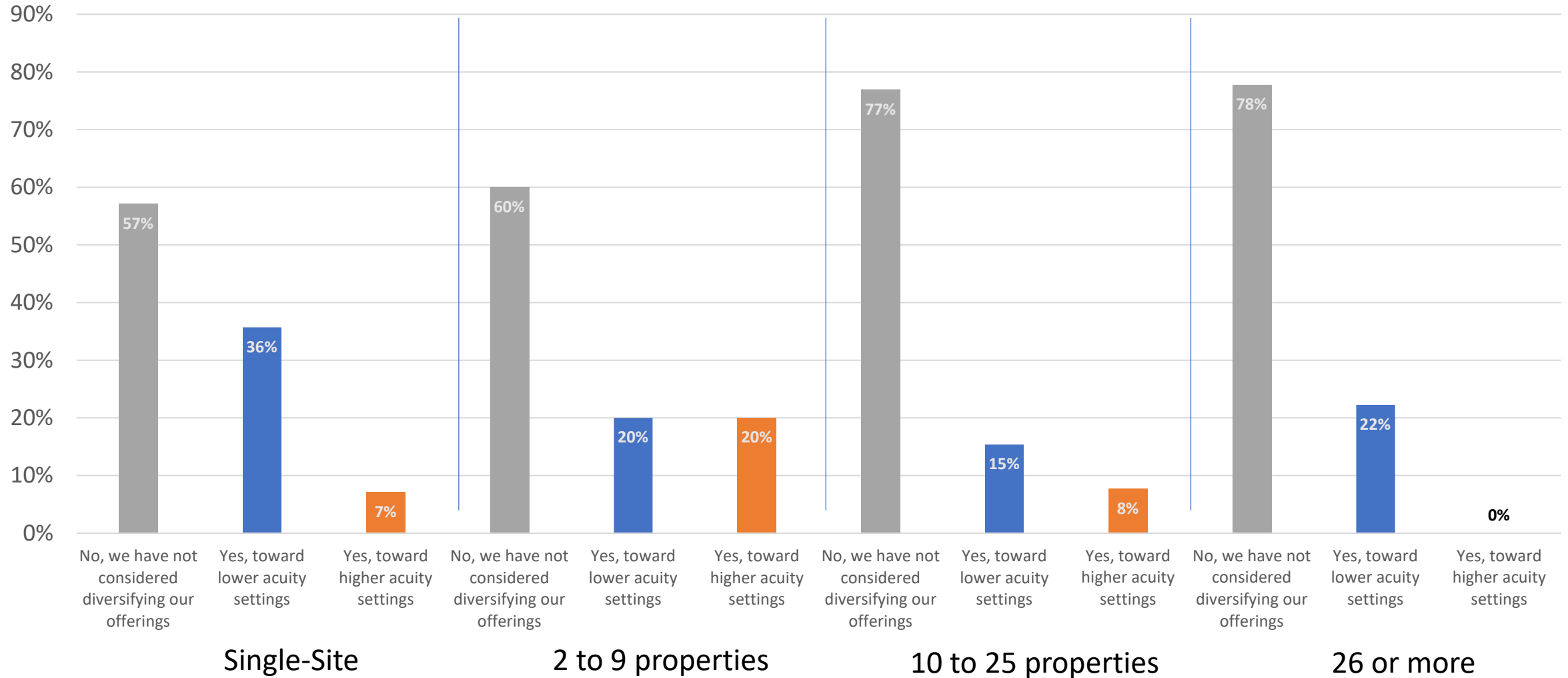
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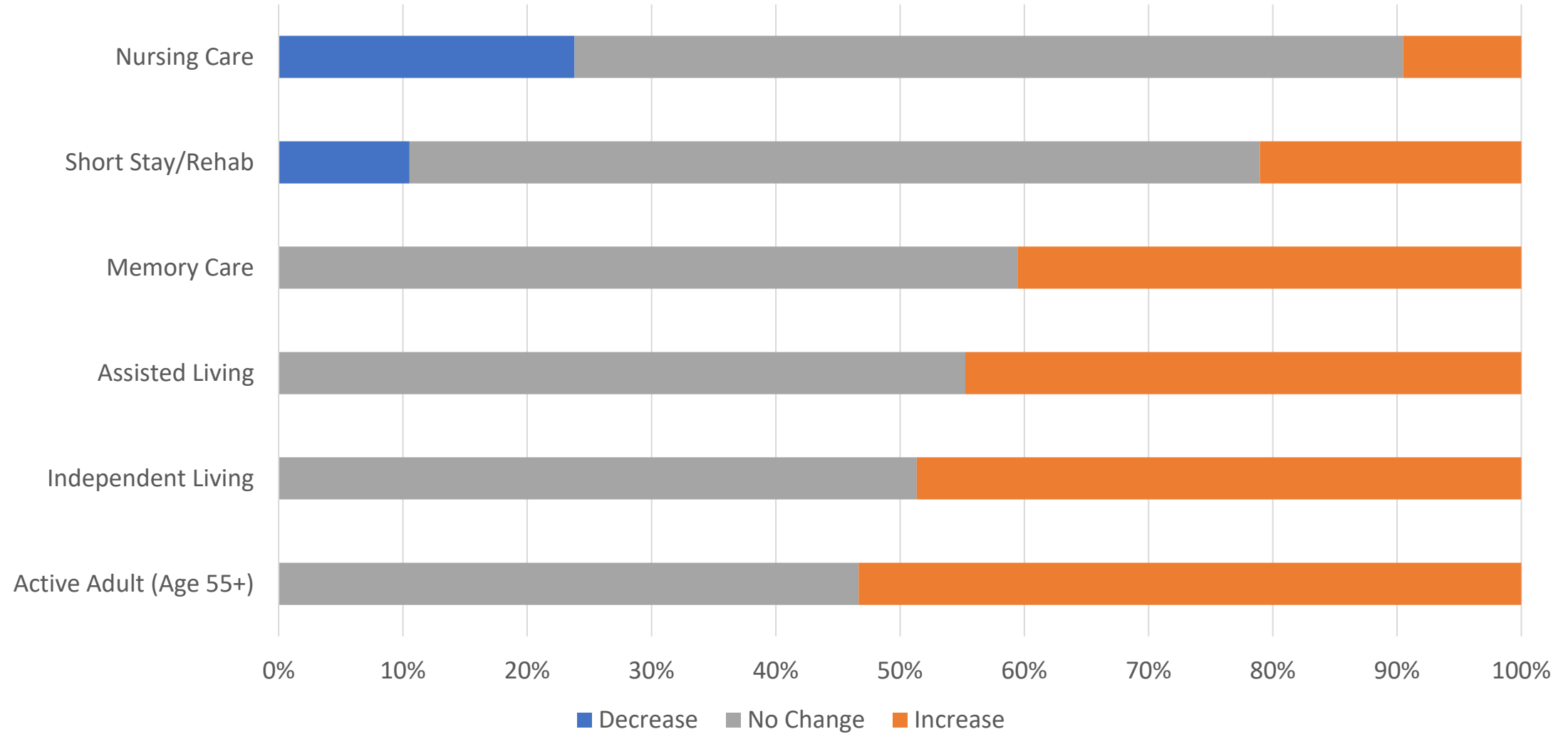
Source: NIC Executive Survey Insights

My Organization is Considering Diversifying Our Product Shown by Operator Size ESI Wave 47



Wave 47 responses were collected from October 17 to November 13, 2022
Source: NIC Executive Survey Insights

Expected Care Segment Changes Within Portfolio of Properties Over the Next 12 Months



Wave 47 responses were collected from October 17 to November 13, 2022

Source: NIC Executive Survey Insights

Demographics – Wave 47

46 responses received

Types of properties owned/operated

- 74% Seniors Housing (IL/AL/MC)
- 17% Nursing Care
- 30% CCRC

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

PROFIT STATUS:

FP: 59%

NFP: 37%

Both: 4%

SIZE:

1 to 10: 52%

11 to 25: 28%

26+: 20%