Senior Housing Census and Operations Update

Move》》N
Software, Inc.

December 2022

Introduction

For over 25 years, Move-N Software has been focused on creating exceptional software exclusively for the Senior Housing industry, designed to increase census and revenues, and enhance resident care. As the industry has changed and technology has advanced, so has Move-N. Our goal is to give our customers more than they expect. During this COVID-19 crisis, as a service to the industry, we have been providing monthly statistics based on data aggregated from our small, mid-sized and large customers across the US and Canada, so that you may get a sense for the pandemic influence on the overall industry.

The information provided in this update consists of month to month, year to date data comparing the last six months of the previous and current year, as of December 31st.
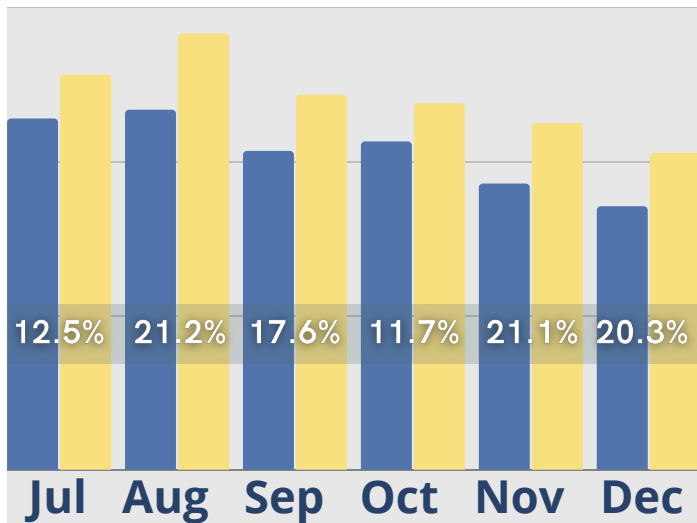
December Analysis

As expected, leads and tours declined during the holidays in December. However, lead totals were over 20% higher than in 2021, and tours were comparable to 2021. Census and cash receipts were both stable and move-ins were slightly improved from the previous year but there was not a significant change from November. Move-outs were reduced and over 5% below December 2021 and the number of days to convert tours to move-ins was still up, averaging 93 days in December but inquiry activity dropped again, and marketing outreach took a big dip compared to activity in the last 2 months. Revenues from recurring monthly charges including room and care fees were steady, with the only noticeable revenue drop occurring in ancillary service fees.
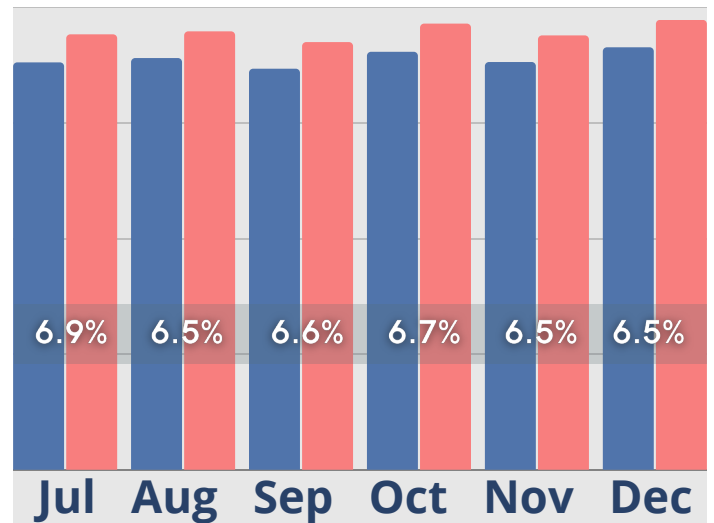
Giving our customers more
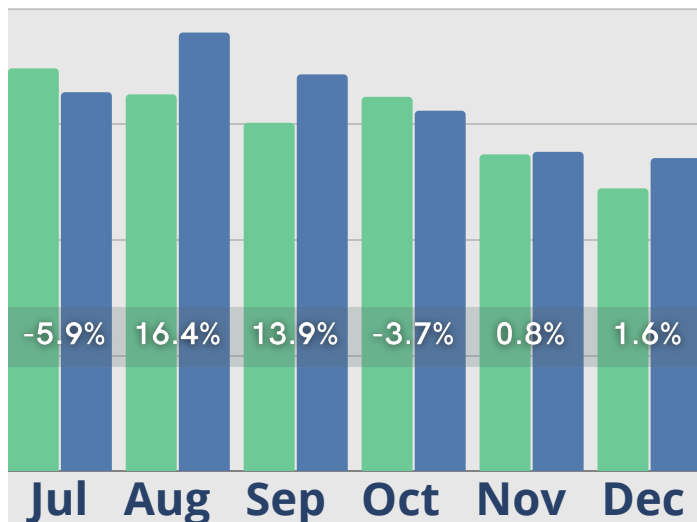than they expect.

Inquiries

Last Year · Current Year

Jul	Aug	Sep	Oct	Nov	Dec
12.5%	21.2%	17.6%	11.7%	21.1%	20.3%

Census

Last Year · Current Year

Jul	Aug	Sep	Oct	Nov	Dec
6.9%	6.5%	6.6%	6.7%	6.5%	6.5%

Initial Tours

Last Year · Current Year

Jul	Aug	Sep	Oct	Nov	Dec
-5.9%	16.4%	13.9%	-3.7%	0.8%	1.6%

Cash Receipts

Last Year · Current Year

Jul	Aug	Sep	Oct	Nov	Dec
21.8%	19.5%	10.8%	16.3%	16.8%	15.5%

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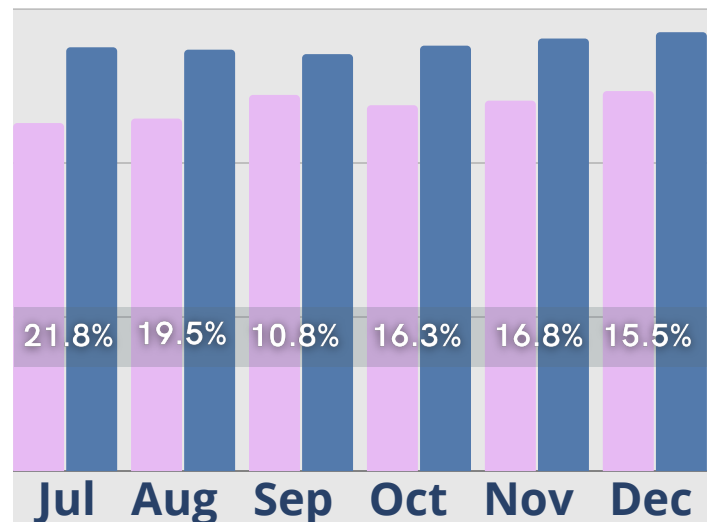
Move-Ins

Last Year · Current Year

Jul	Aug	Sep	Oct	Nov	Dec
-16.7%	0.4%	3.1%	-5.6%	-2.9%	3.1%
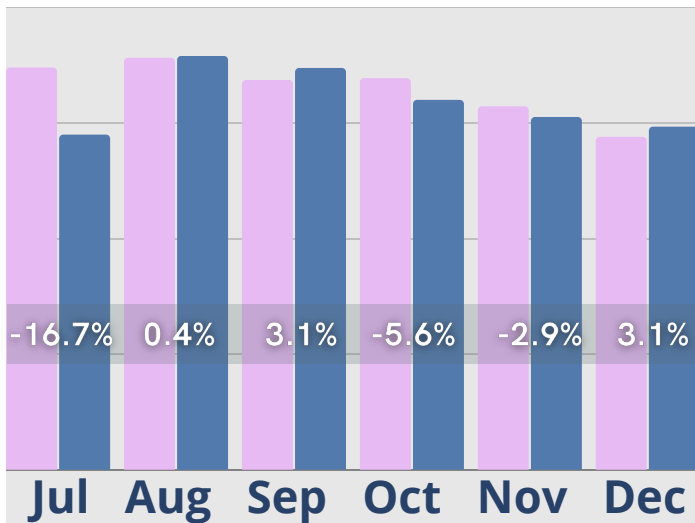
Activity Completed-Inquiry

Last Year · Current Year

Jul	Aug	Sep	Oct	Nov	Dec
1.1%	-14.6%	10.8%	-22.5%	12.5%	-3.7%
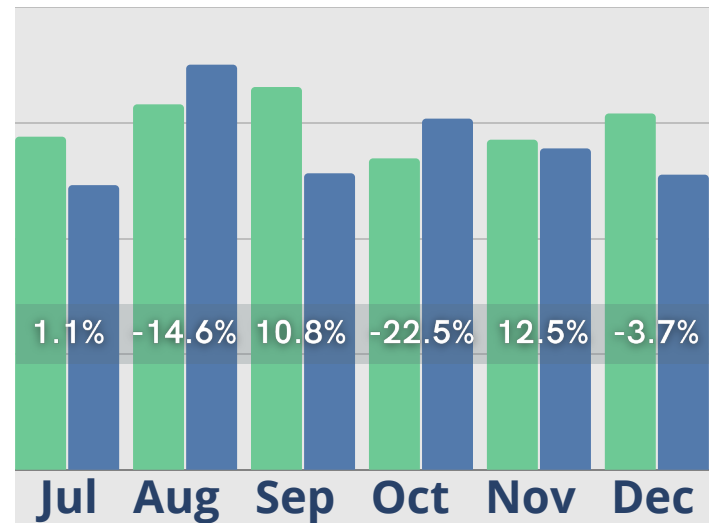
Move-Outs

Last Year · Current Year

Jul	Aug	Sep	Oct	Nov	Dec
-0.8%	-2.6%	-9.1%	3.5%	-5.3%	-5.5%
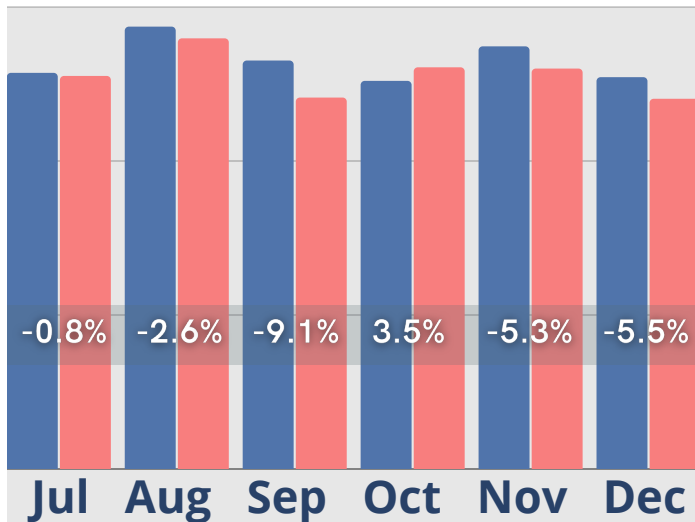
Activity Completed-Marketing

Last Year · Current Year

Jul	Aug	Sep	Oct	Nov	Dec
37.8%	63.1%	16.8%	152.0%	256.3%	-0.8%

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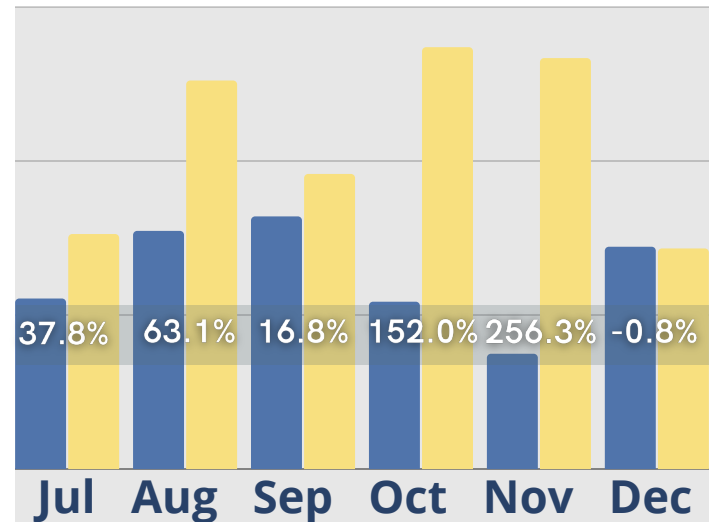
Average Tour to Move-In Conversion Days

Last Year • Current Year

	Jul	Aug	Sep	Oct	Nov	Dec
Last Year	71	63	85	69	69	89
Current Year	92	64	89	65	94	93
%	28.9%	1.6%	4.7%	-6.7%	36.0%	5.1%
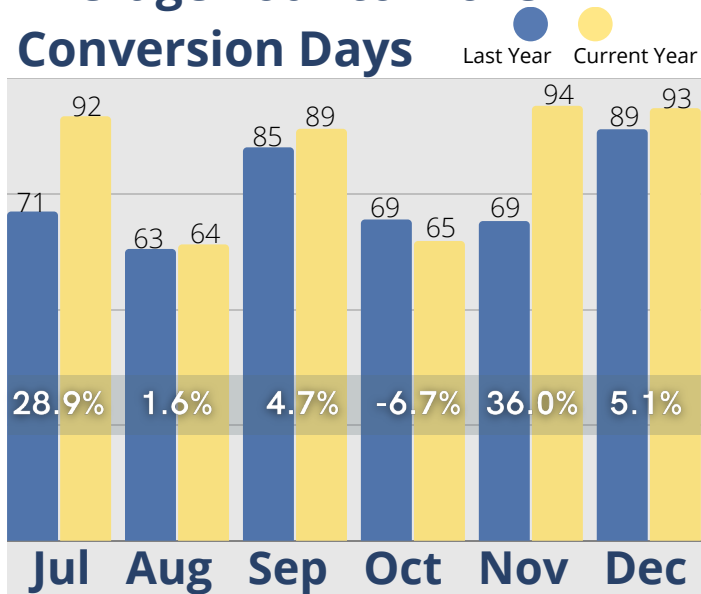
Residents w/ Assessments

Last Year • Current Year

	Jul	Aug	Sep	Oct	Nov	Dec
%	15.2%	16.0%	16.3%	19.3%	18.8%	18.6%

Incidents

Last Year • Current Year

	Jul	Aug	Sep	Oct	Nov	Dec
%	20.5%	9.2%	9.4%	13.7%	5.6%	7.0%
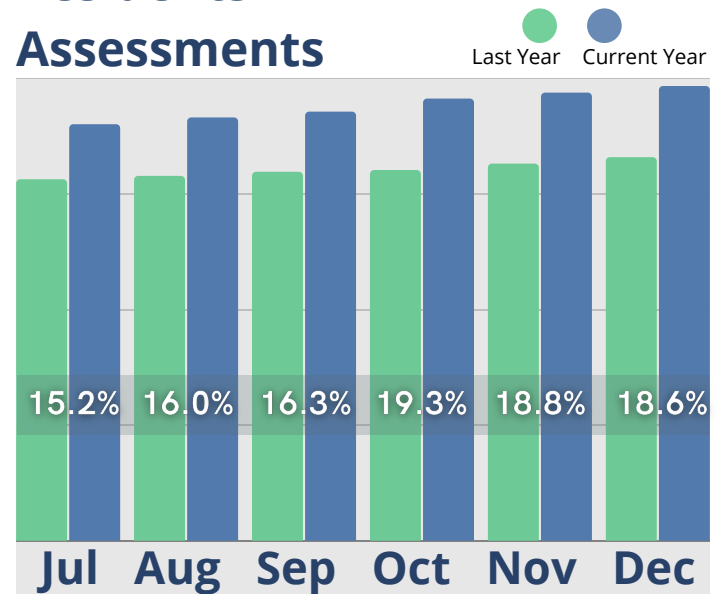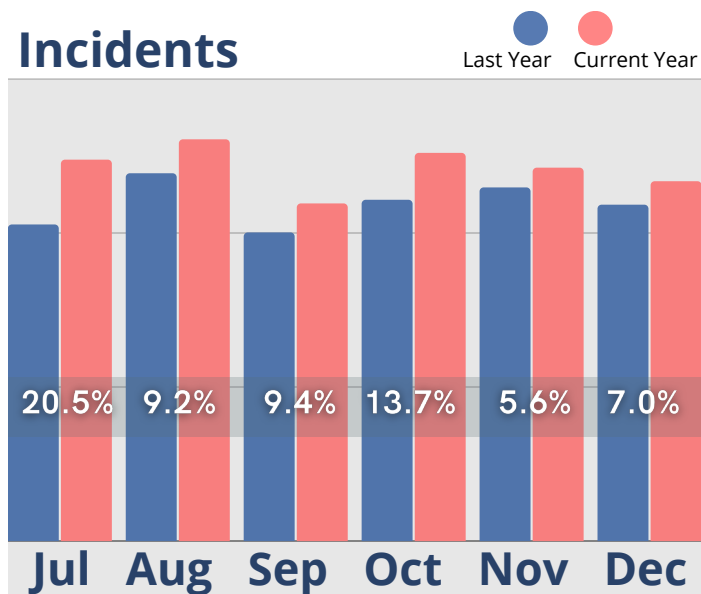
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Rent Roll Summary- Room Rate

Jul	Aug	Sep	Oct	Nov	Dec
18.7%	19.3%	19.9%	21.0%	20.8%	20.5%
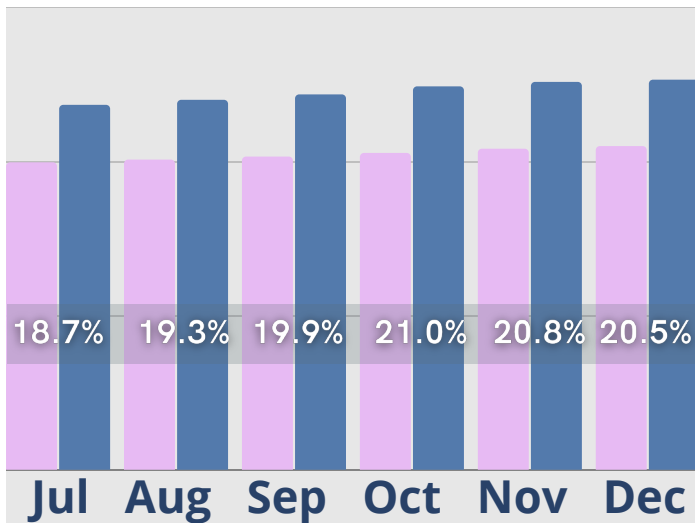
Rent Roll Summary- Assessment Fee

Jul	Aug	Sep	Oct	Nov	Dec
42.0%	41.8%	42.2%	44.5%	38.0%	20.8%
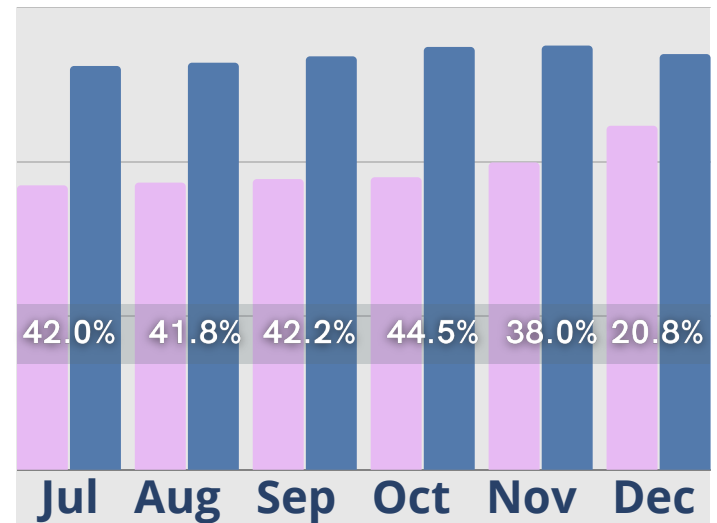
Rent Roll Summary- Monthly Fees

Jul	Aug	Sep	Oct	Nov	Dec
80.3%	36.6%	29.5%	21.2%	11.8%	27.5%
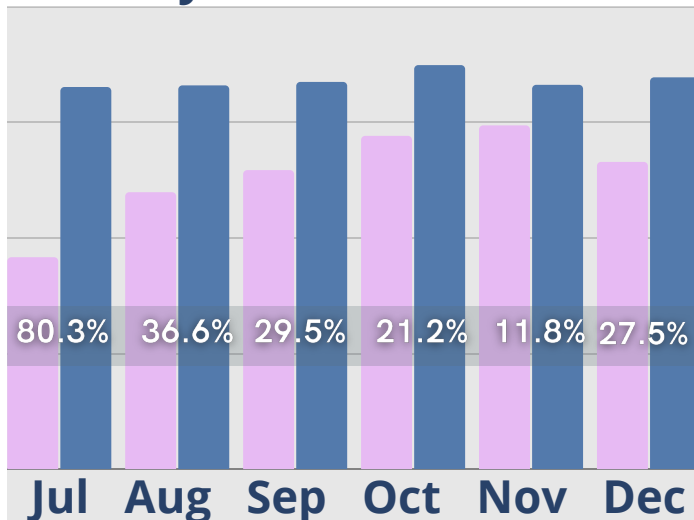
Rent Roll Summary- Service Fee
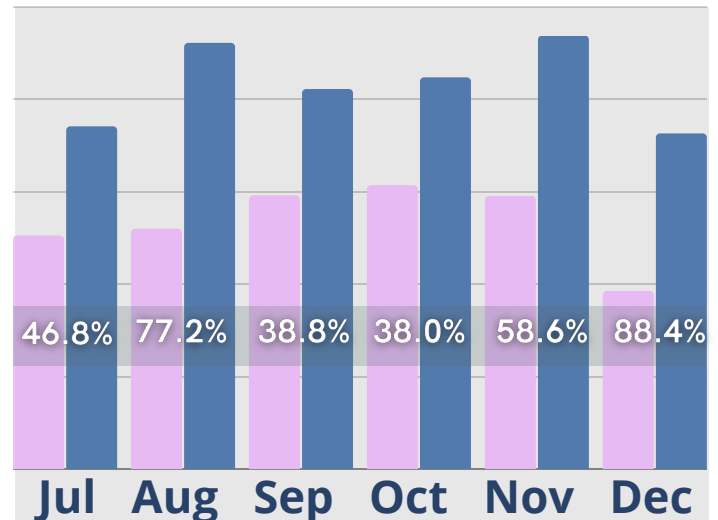
Jul	Aug	Sep	Oct	Nov	Dec
46.8%	77.2%	38.8%	38.0%	58.6%	88.4%

Last Year   Current Year

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