Senior Housing Census and Operations Update

Move>>N Software, Inc.

November 2024

Introduction

For more than 28 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. 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 how your communities compare to national averages.

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 November 30th.
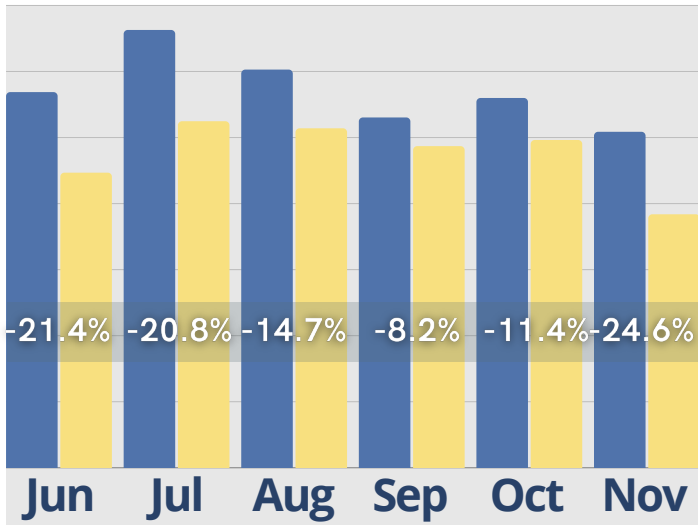
November Analysis

From November 2023 to November 2024, senior living communities experienced a 3.3% increase in census numbers, highlighting strong retention and sustained demand. Occupancy rates remained stable across communities, reflecting a consistent interest in available spaces. While the average time from tour to move-in continues to lengthen, this trend aligns with the rising days on market for home sales, suggesting broader market dynamics at play. Inquiries saw a decline of 24.6%, and tours experienced a slight dip compared to the previous year. Additionally, move-ins decreased both from October and in the year-over-year comparison. Despite these fluctuations, the communities maintain steady performance, supported by their ability to adapt to changing market conditions.

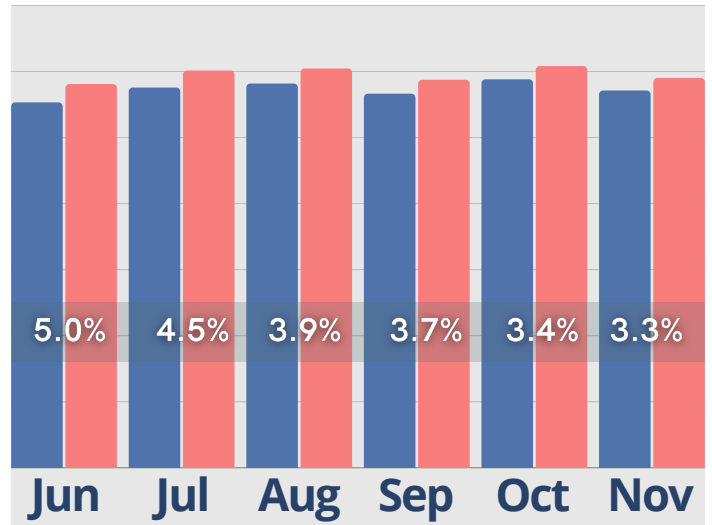For a more in depth look into this our additional information, reach out to https://move-n.com/contact-us/
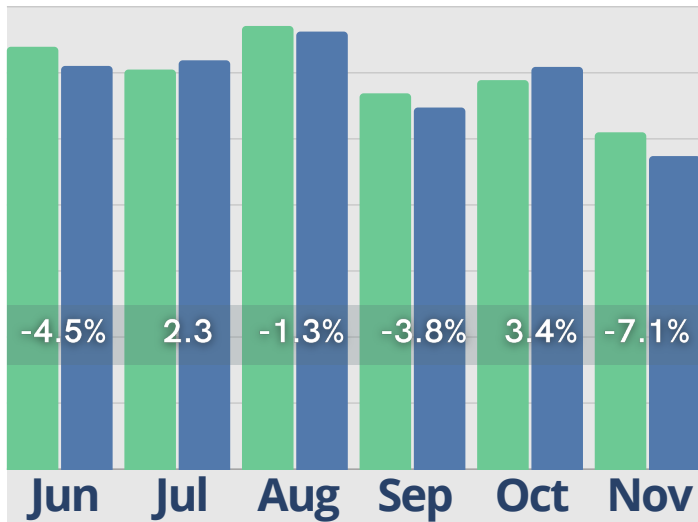
Inquiries

Last Year   Current Year

Jun	Jul	Aug	Sep	Oct	Nov
-21.4%	-20.8%	-14.7%	-8.2%	-11.4%	-24.6%

Census

Last Year   Current Year

Jun	Jul	Aug	Sep	Oct	Nov
5.0%	4.5%	3.9%	3.7%	3.4%	3.3%

Initial Tours

Last Year   Current Year

Jun	Jul	Aug	Sep	Oct	Nov
-4.5%	2.3	-1.3%	-3.8%	3.4%	-7.1%

Cash Receipts

Last Year   Current Year

Jun	Jul	Aug	Sep	Oct	Nov
29.4%	32.0%	24.3%	28.0%	24.6%	27.4%

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Move-Ins

Last Year   Current Year

	Jun	Jul	Aug	Sep	Oct	Nov
	-17.4%	4.9%	-4.4%	-15.9%	14.0%	-9.1%
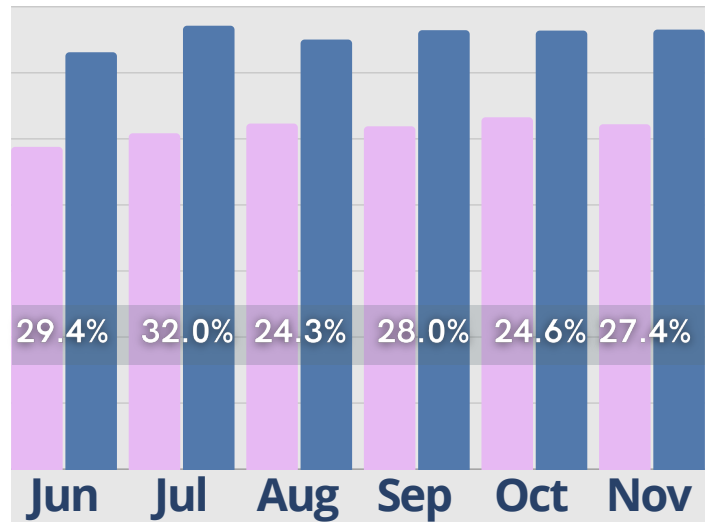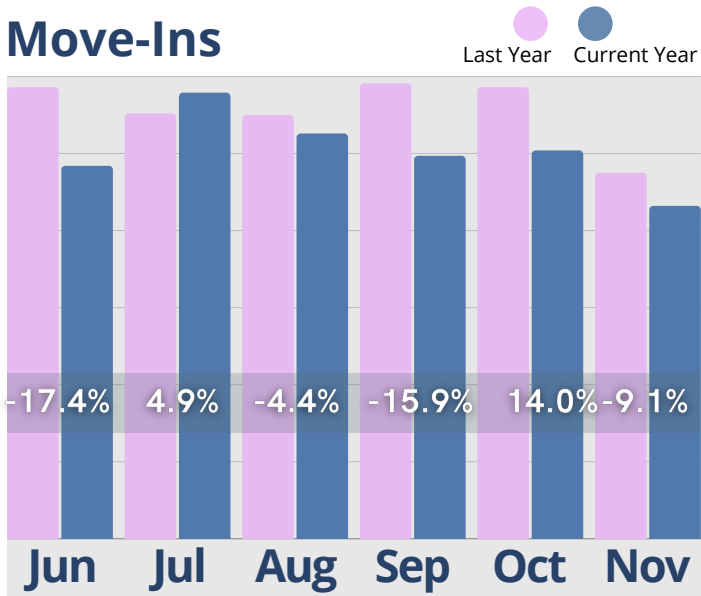
Activity Completed-Inquiry

Last Year   Current Year

	Jun	Jul	Aug	Sep	Oct	Nov
	-8.2%	-22.5%	-13.6%	24.6%	18.0%	-12.9%

Move-Outs

Last Year   Current Year

	Jun	Jul	Aug	Sep	Oct	Nov
	5.8%	33.4%	1.4%	-11.0%	-7.5%	-0.5
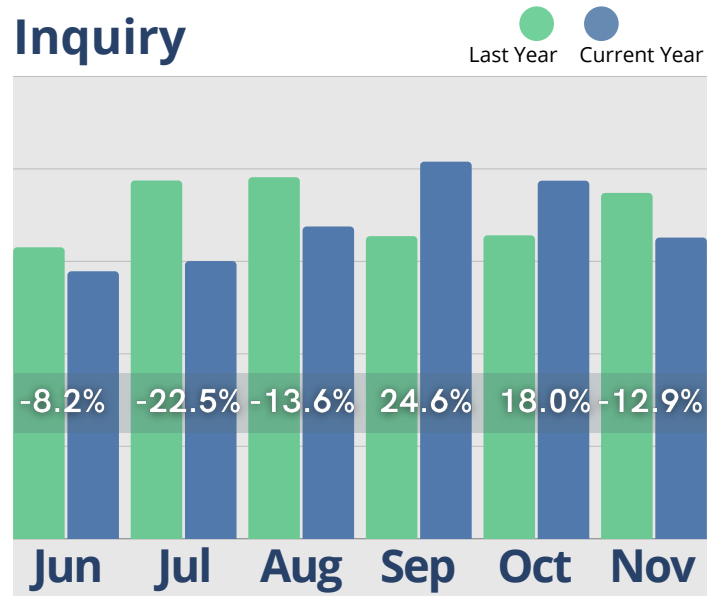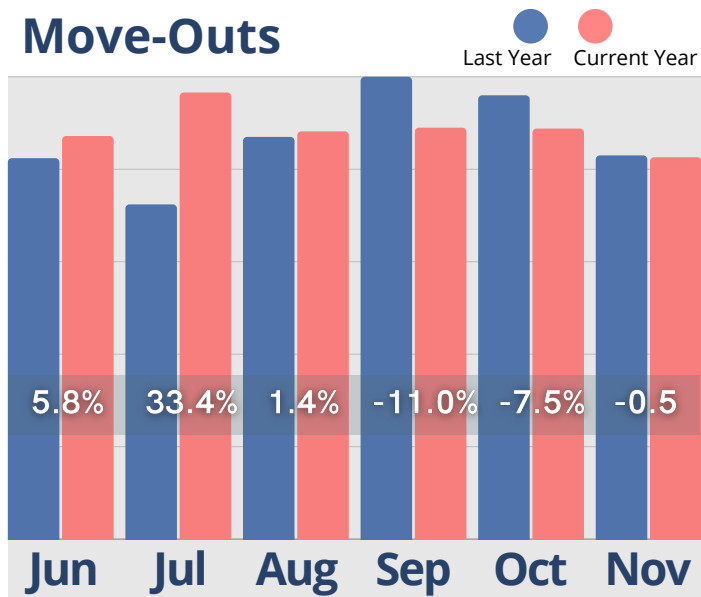
Activity Completed-Marketing

Last Year   Current Year

	Jun	Jul	Aug	Sep	Oct	Nov
	-30.3%	-52.2%	34.8%	-36.2%	-1.1%	88.7%

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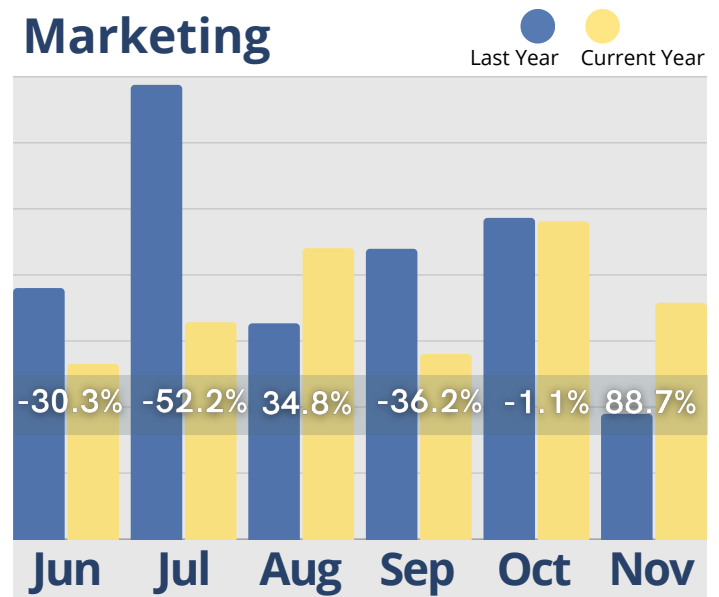
Average Tour to Move-In Conversion Days

Last Year   Current Year

Jun	Jul	Aug	Sep	Oct	Nov
-21.2%	32.3%	3.7%	26.4%	9.0%	5.7%
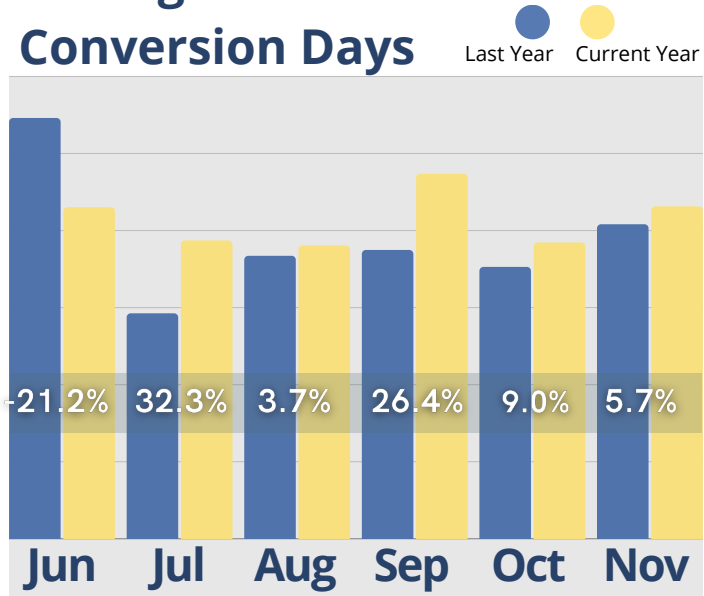
Residents w/ Assessments

Last Year   Current Year

Jun	Jul	Aug	Sep	Oct	Nov
10.6%	11.8%	12.0%	11.5%	12.1%	11.8%

Incidents

Last Year   Current Year

Jun	Jul	Aug	Sep	Oct	Nov
-19.0%	-10.6%	4.4%	-0.2%	19.3%	14.7%
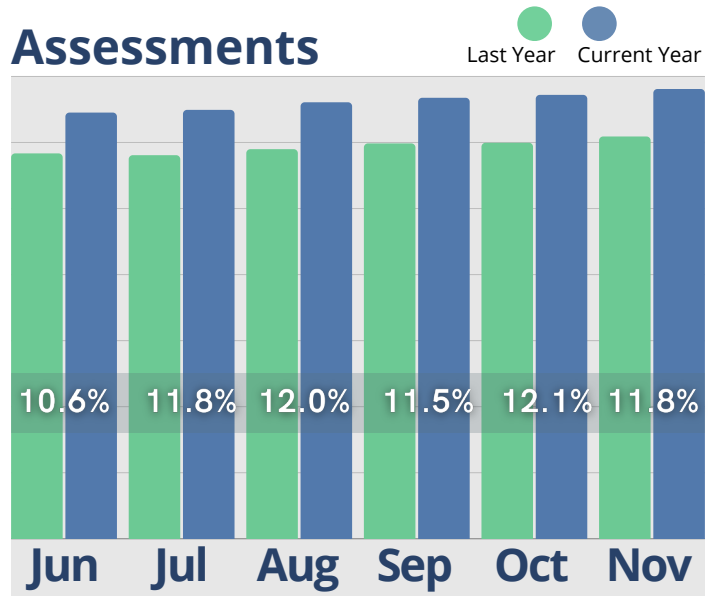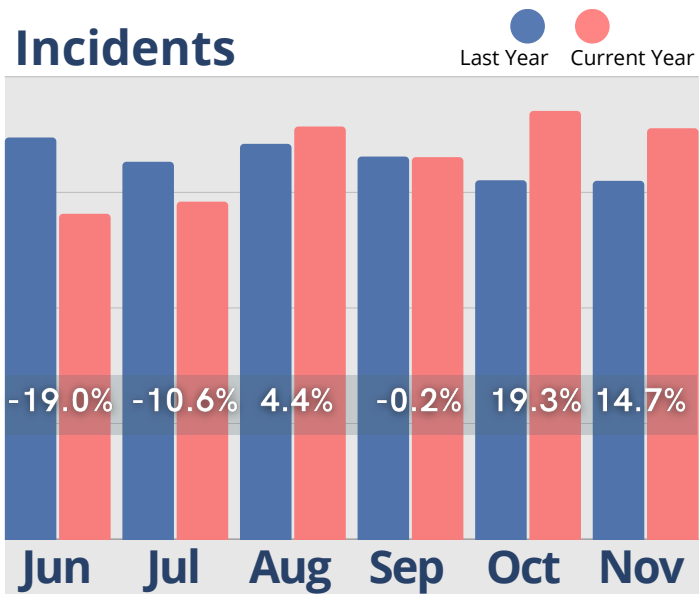
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Rent Roll Summary- Room Rate

Jun	Jul	Aug	Sep	Oct	Nov
20.1%	19.8%	20.1%	26.7%	26.8%	28.0%
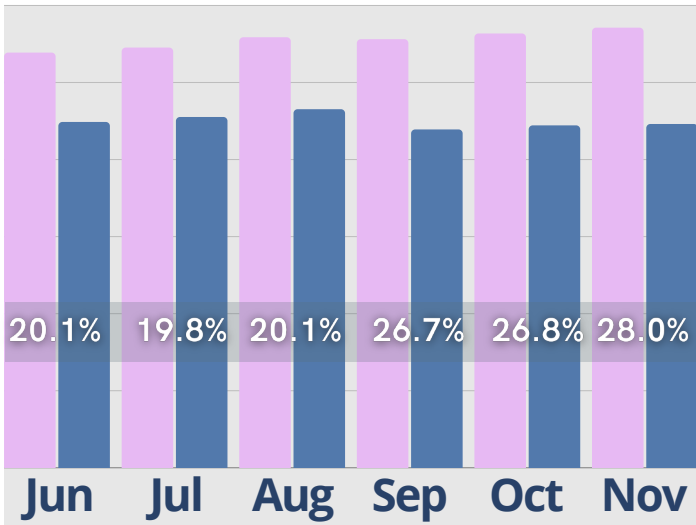
Rent Roll Summary- Assessment Fee

Jun	Jul	Aug	Sep	Oct	Nov
21.3%	18.2%	16.6%	20.0%	18.2%	21.7%
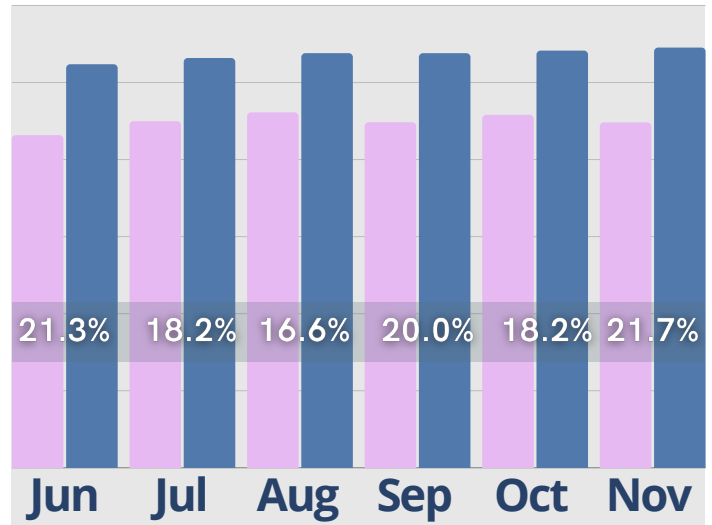
Rent Roll Summary- Monthly Fees

Jun	Jul	Aug	Sep	Oct	Nov
29.1%	-8.6%	38.2%	25.7	25.1%	14.8%
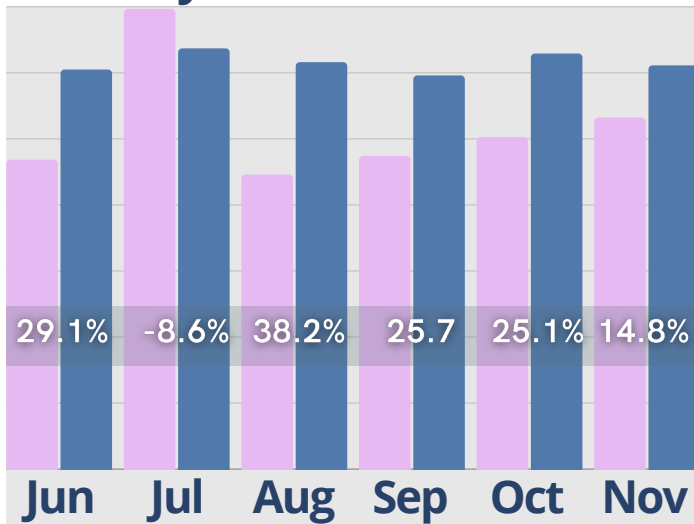
Rent Roll Summary- Service Fee
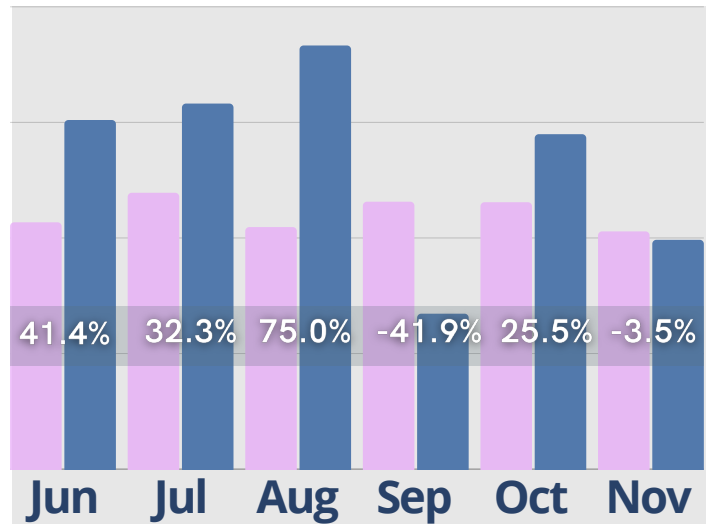
Jun	Jul	Aug	Sep	Oct	Nov
41.4%	32.3%	75.0%	-41.9%	25.5%	-3.5%

Last Year   Current Year

MoveN Software, Inc.

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