Senior Housing Census and Operations Update

July 2025

Move N
Software, Inc.

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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. The goal is to give customers more than they expect. As a service to the industry, we have been providing monthly statistics based on data aggregated from 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 July 31st.

JULY ANALYSIS

In a challenging market where inquiries are down, communities are reporting a positive trend with census up 1.49% for the period. This growth is being sustained despite a 19.57% decrease in move-ins, which has been offset by a corresponding 21.17% reduction in move-outs. This proactive stabilization of occupancy is creating a much-needed foundation for continued financial health.

This success is largely driven by community teams strategically leveraging the powerful Move-N Marketing Automation and Engage 360 platform. In a period where total inquiries and initial tours are down 14.68% and 19.41% respectively, customers are using the platform's marketing automation and targeted drip campaigns to maximize the value of every single lead. They are intentionally engaging prospects and nurturing them through the sales cycle, ensuring that the communities are not just surviving, but actively competing for available market share.
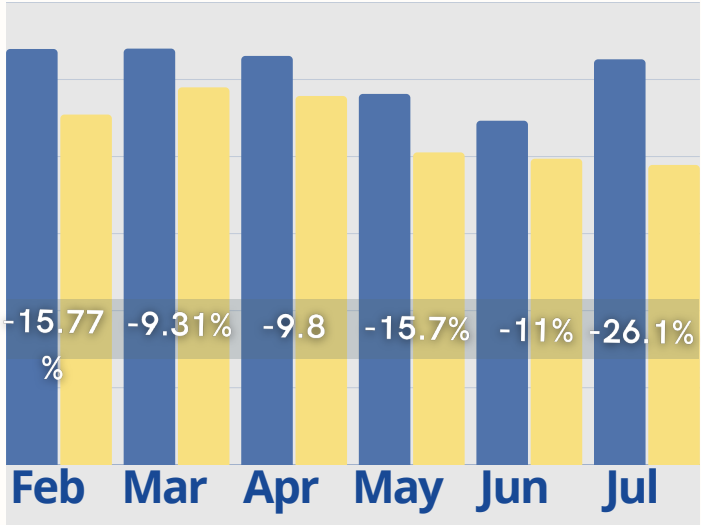
This tactical approach to stabilizing occupancy sets the stage for future financial health. While cash receipts and rent rolls have faced challenges, the positive census growth is the crucial first step in reversing these trends. By leveraging Move-N's technology to successfully navigate market pressures, the way is paved for improved cash flow and a stronger rent roll in the months ahead. This demonstrates the direct and tangible value of Move-N Software's platform in building a resilient foundation for long-term growth.
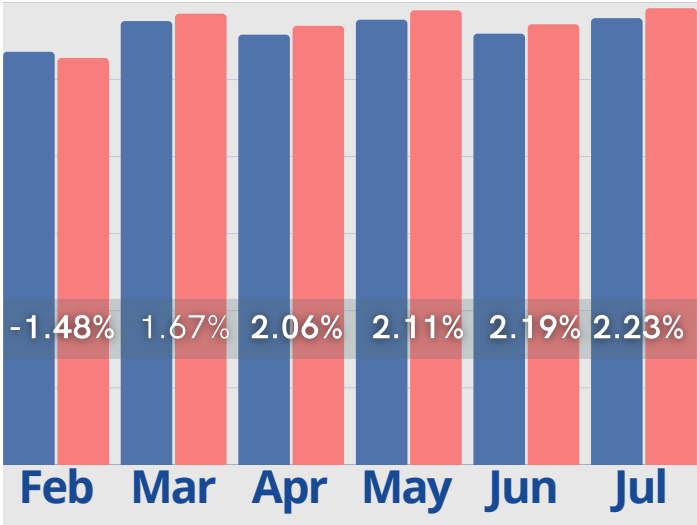
JULY LAST 6 MONTHS
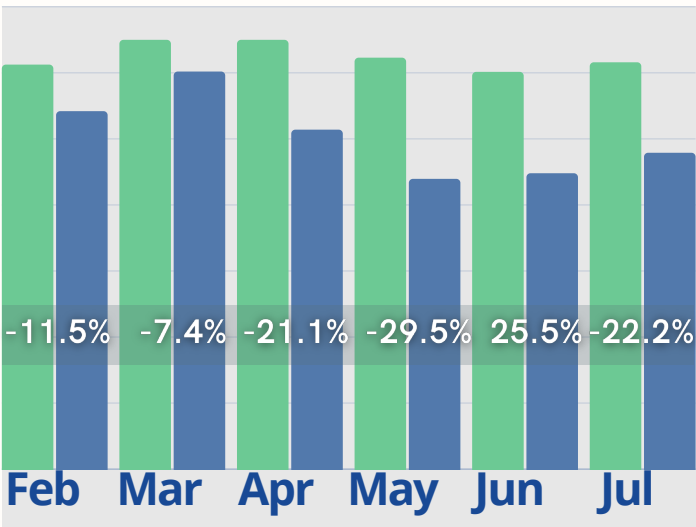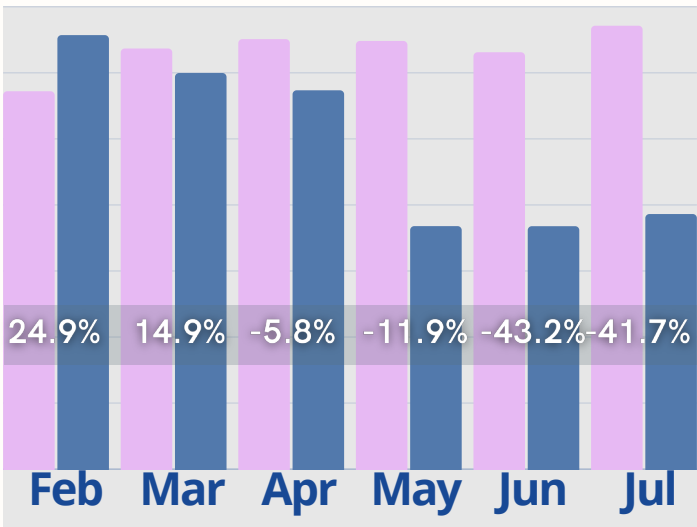
Inquiries

Last Year   Current Year

Feb	Mar	Apr	May	Jun	Jul
-15.77%	-9.31%	-9.8	-15.7%	-11%	-26.1%

Census

Last Year   Current Year

Feb	Mar	Apr	May	Jun	Jul
-1.48%	1.67%	2.06%	2.11%	2.19%	2.23%

Initial Tours

Last Year   Current Year

Feb	Mar	Apr	May	Jun	Jul
-11.5%	-7.4%	-21.1%	-29.5%	25.5%	-22.2%

Cash Receipts

Last Year   Current Year

Feb	Mar	Apr	May	Jun	Jul
24.9%	14.9%	-5.8%	-11.9%	-43.2%	-41.7%

JULY LAST 6 MONTHS

Move-Ins

Last Year Current Year

-21.6% -1.1% -7.2% -28.6% -22.7% -36%

Feb Mar Apr May Jun Jul
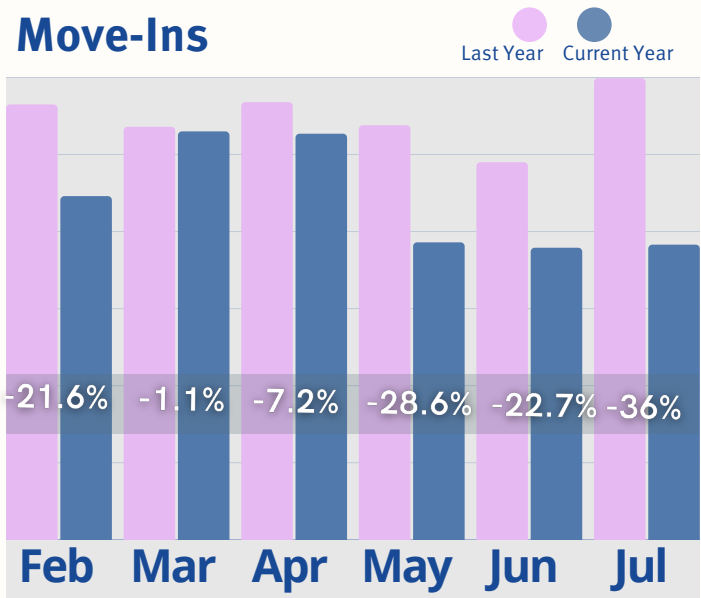
Activity Completed-Inquiry

Last Year Current Year

-20.6% -18% 4.1% -20% 17.4% -3.3%

Feb Mar Apr May Jun Jul

Move-Outs

Last Year Current Year

-5.4% -7% -18.6% -27.6% -27.2% -40.5%

Feb Mar Apr May Jun Jul
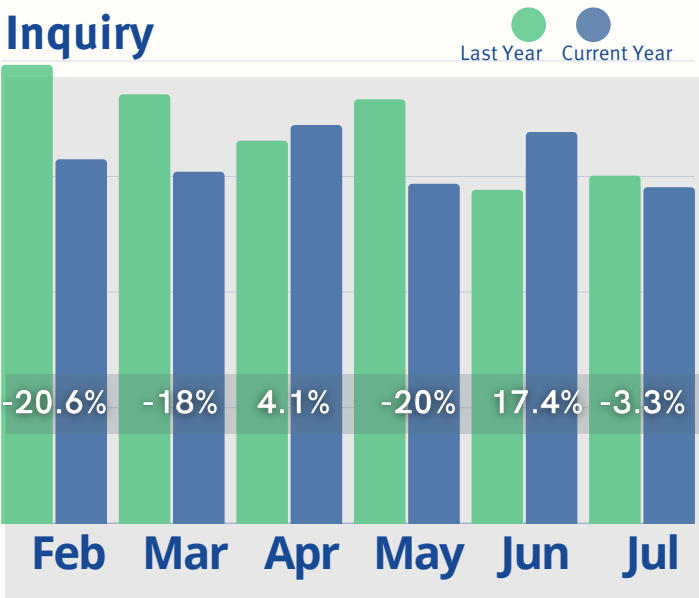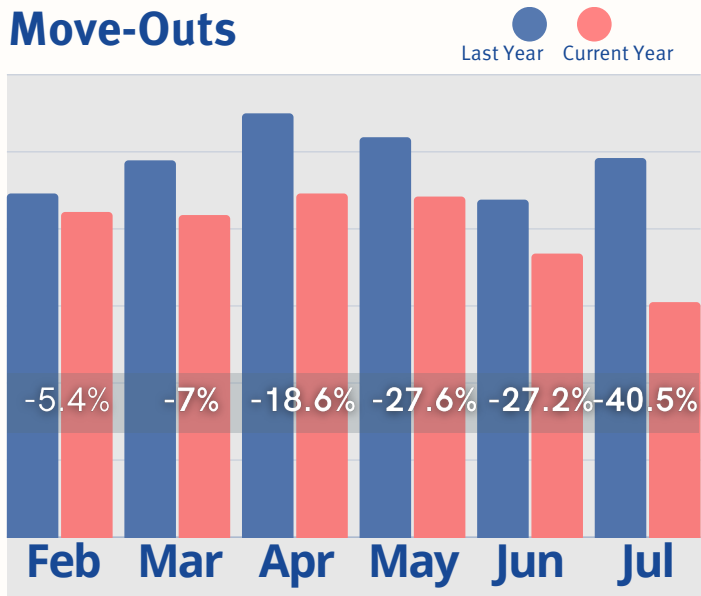
Activity Completed-Marketing

Last Year Current Year

-27.6% -39% -47.6% 27.8% 75.7% 14.5%

Feb Mar Apr May Jun Jul
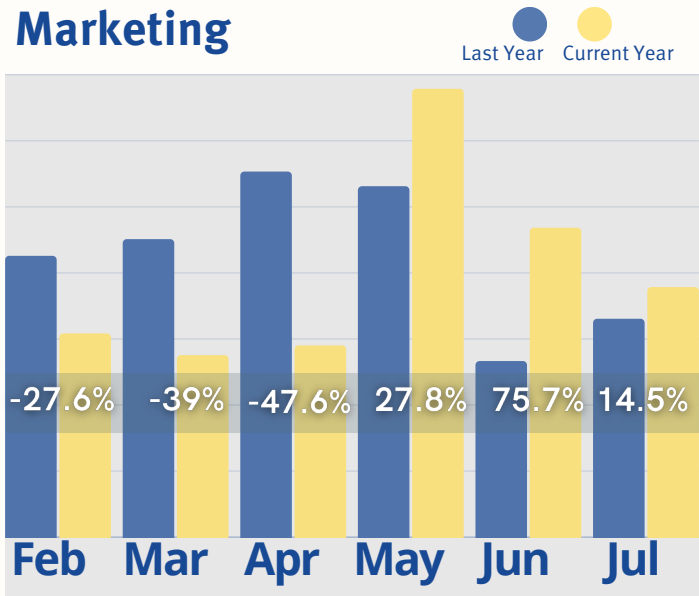
JULY LAST 6 MONTHS

Average Tour to Move-In Conversion Days

Last Year · Current Year

Feb	Mar	Apr	May	Jun	Jul
-1.9%	54.1%	69.7%	84.5%	-24%	-15.1%
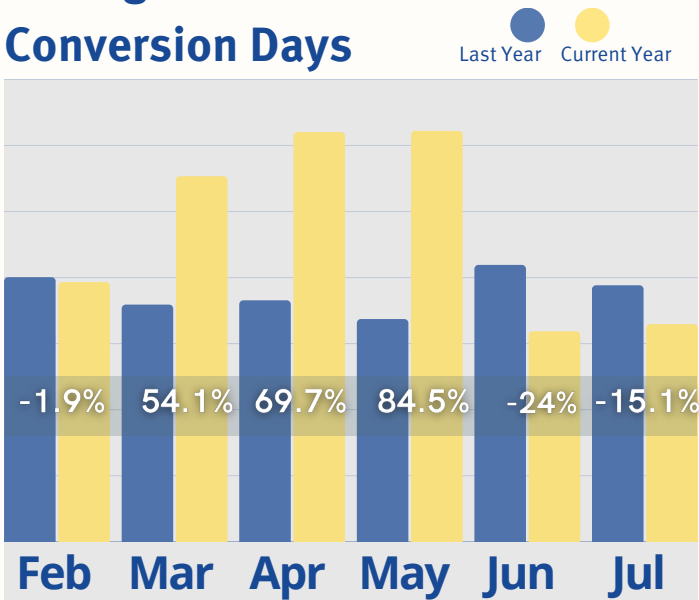
Residents w/ Assessments

Last Year · Current Year

Feb	Mar	Apr	May	Jun	Jul
3.2%	1.4%	1.6%	4%	6.4%	8%

Incidents

Last Year · Current Year

Feb	Mar	Apr	May	Jun	Jul
-9.2%	-2.2%	-13.1%	18.5%	6.4%	6%
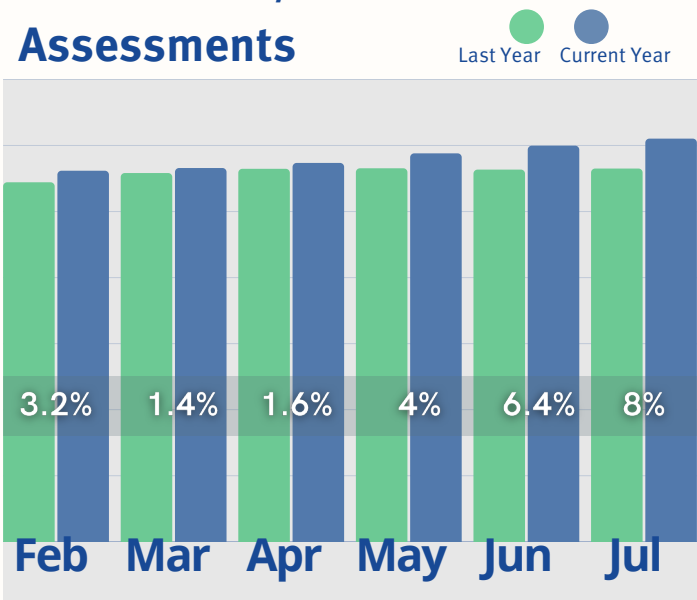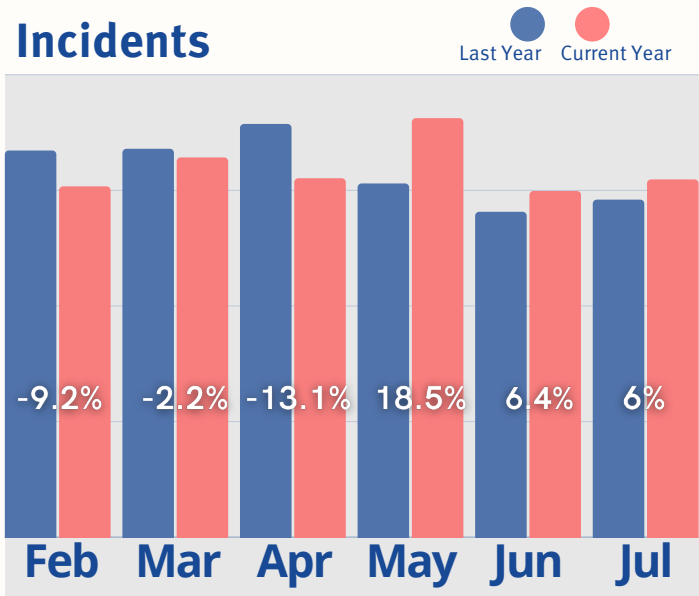
JULY LAST 6 MONTHS

Rent Roll Summary- Room Rate

Feb	Mar	Apr	May	Jun	Jul
23%	10.7%	-8.8%	-12.3%	-43%	-43%
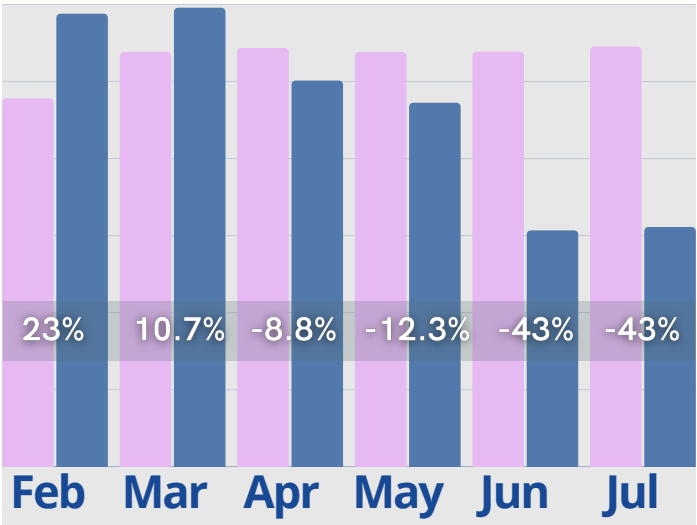
Rent Roll Summary- Assessment Fee

Feb	Mar	Apr	May	Jun	Jul
20.6%	17.8%	13.1%	-0.7%	-5.8%	-46.8%
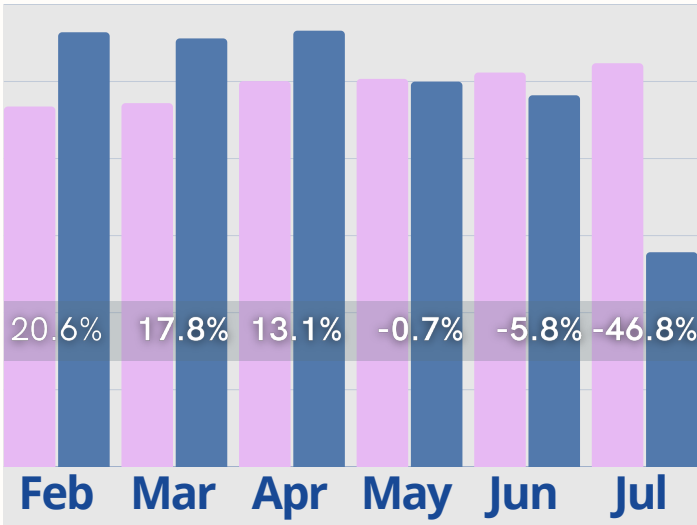
Rent Roll Summary- Monthly Fees

Feb	Mar	Apr	May	Jun	Jul
17.8%	13.1%	-1%	-5.8%	-46.9%	-45.7%
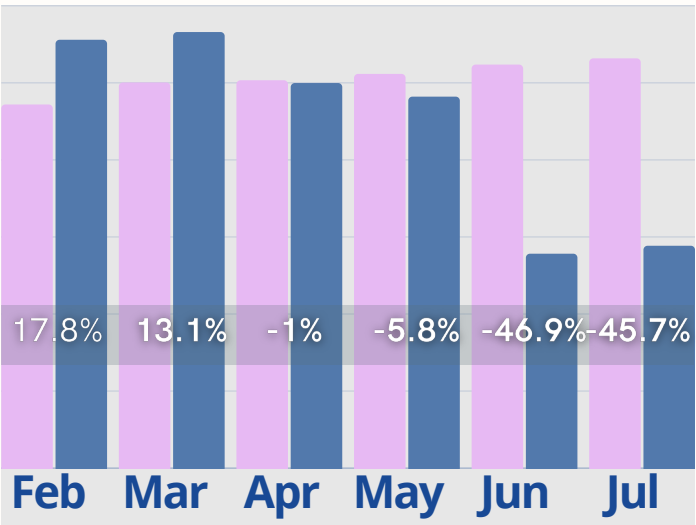
Rent Roll Summary- Service Fee

Feb	Mar	Apr	May	Jun	Jul
-1.4%	-1.4%	-13.7%	-51%	-47.6%	-44.3%
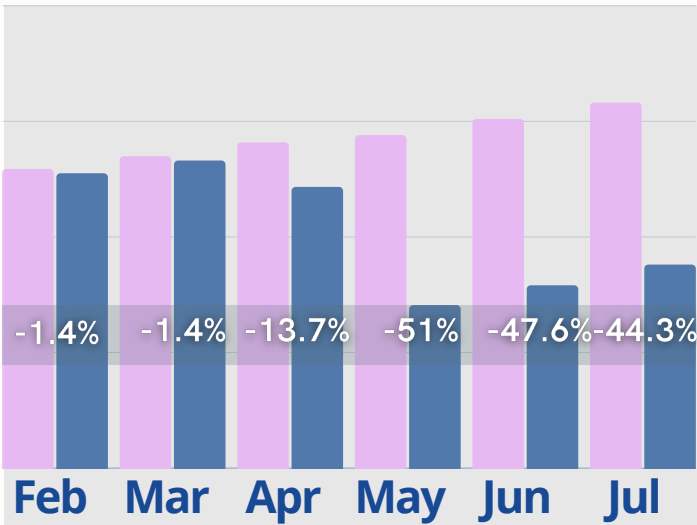
Last Year   Current Year

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