# Senior Housing Census and Operations Update

November 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 November 30th.
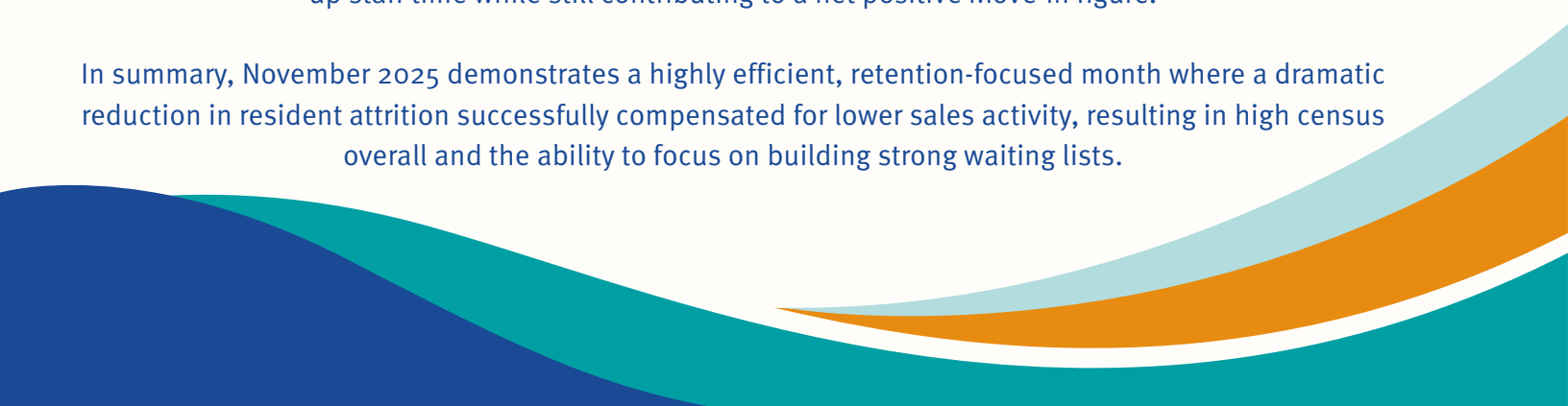
# NOVEMBER ANALYSIS

Retention Dominates Growth, Driving High Census & Wait Lists
The most favorable trend for operators in November was the significant reduction in Move Outs down 36.4%. This exceptional resident retention is the primary driver behind the monthly census growth of 2.36% year-over-year. This strong performance indicates that communities are successfully maintaining a high overall census and actively building strong waiting lists by controlling attrition and maximizing occupancy. A stable resident base reduces marketing costs, turnover expenses, and administrative burden.

While Inquiries were down 17.77% and Initial tours were lower 23.45%, the overall census still increased by a strong 2.36% year-over-year. This increase confirms that the lower volume of sales activity was sufficiently effective when combined with excellent retention efforts. This suggests the communites are prioritizing quality over quantity in the sales pipeline.

The reduction in Average Tour Time down 18.08% indicates that sales teams are either highly efficient in their presentations or are qualifying leads more aggressively before the physical tour. The shorter duration frees up staff time while still contributing to a net positive Move-In figure.
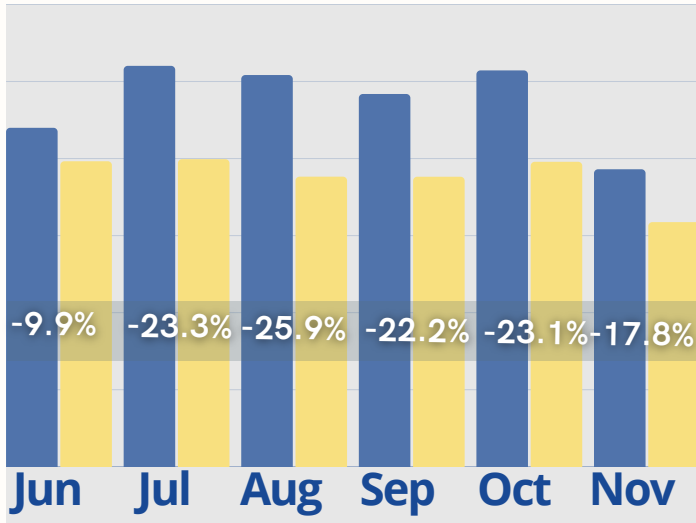
In summary, November 2025 demonstrates a highly efficient, retention-focused month where a dramatic reduction in resident attrition successfully compensated for lower sales activity, resulting in high census overall and the ability to focus on building strong waiting lists.
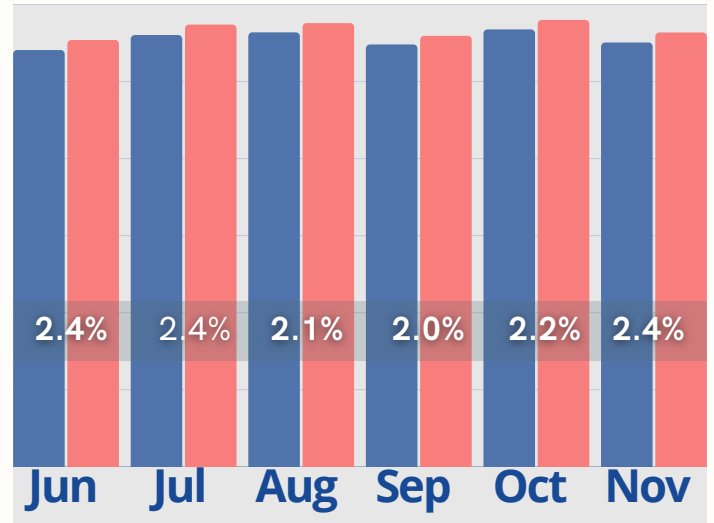
# NOVEMBER LAST 6 MONTHS
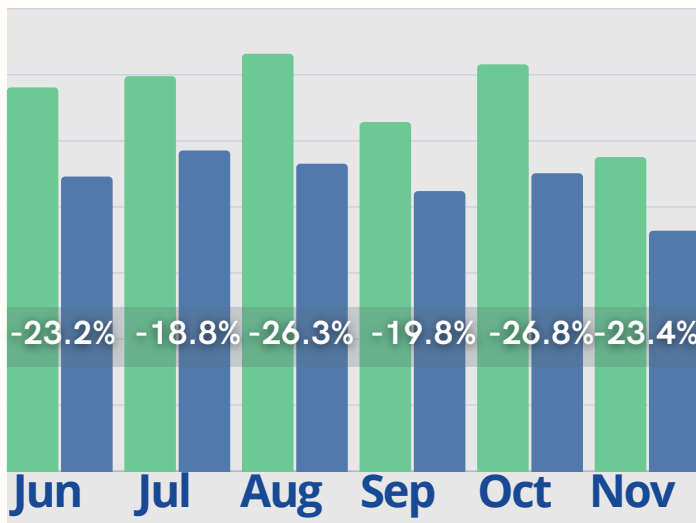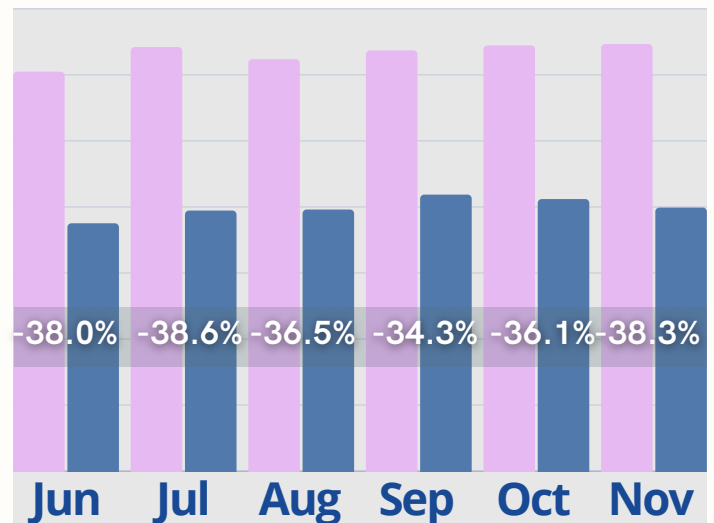
## Inquiries

Last Year ● Current Year ●

| Jun | Jul | Aug | Sep | Oct | Nov |
|-----|-----|-----|-----|-----|-----|
| -9.9% | -23.3% | -25.9% | -22.2% | -23.1% | -17.8% |

## Census

Last Year ● Current Year ●

| Jun | Jul | Aug | Sep | Oct | Nov |
|-----|-----|-----|-----|-----|-----|
| 2.4% | 2.4% | 2.1% | 2.0% | 2.2% | 2.4% |

## Initial Tours

Last Year ● Current Year ●

| Jun | Jul | Aug | Sep | Oct | Nov |
|-----|-----|-----|-----|-----|-----|
| -23.2% | -18.8% | -26.3% | -19.8% | -26.8% | -23.4% |

## Cash Receipts

Last Year ● Current Year ●

| Jun | Jul | Aug | Sep | Oct | Nov |
|-----|-----|-----|-----|-----|-----|
| -38.0% | -38.6% | -36.5% | -34.3% | -36.1% | -38.3% |

# NOVEMBER LAST 6 MONTHS

## Move-Ins

Last Year  Current Year

| Jun | Jul | Aug | Sep | Oct | Nov |
|-----|-----|-----|-----|-----|-----|
| -19.0% | -33.0% | -28.1% | -11.9% | -11.6% | -33.3% |
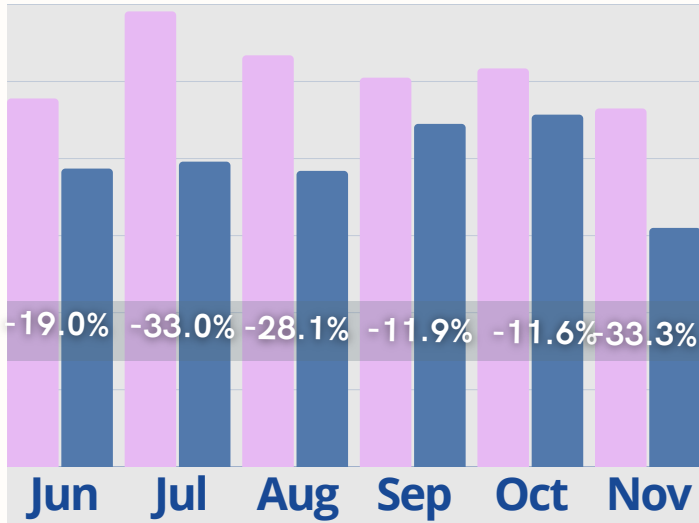
## Activity Completed-Inquiry

Last Year  Current Year

| Jun | Jul | Aug | Sep | Oct | Nov |
|-----|-----|-----|-----|-----|-----|
| 18.2% | -1.9% | -13.0% | -34.8% | 32.6% | -23.1% |
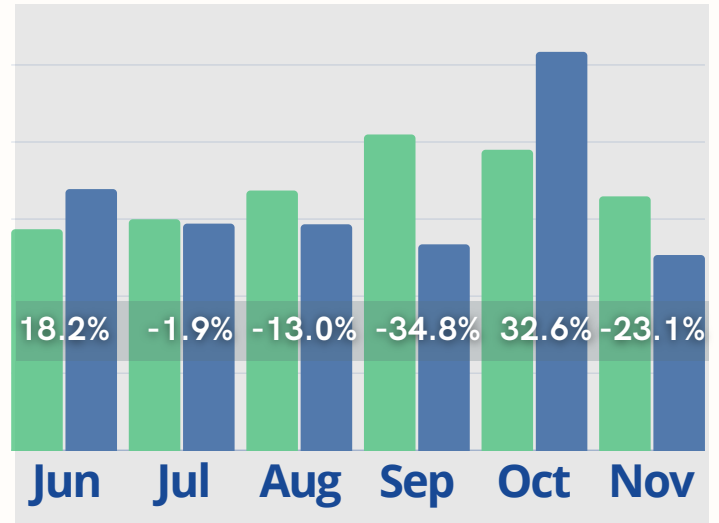
## Move-Outs

Last Year  Current Year

| Jun | Jul | Aug | Sep | Oct | Nov |
|-----|-----|-----|-----|-----|-----|
| -22.7% | -32.0% | -18.6% | -26.9% | -23.2% | -36.4% |
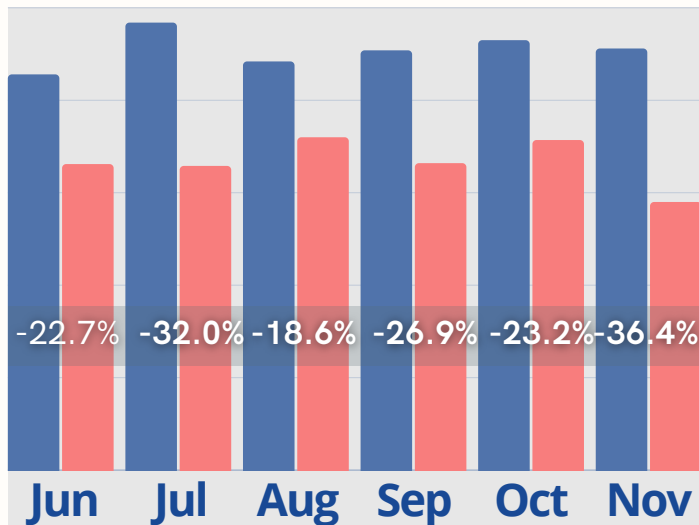
## Activity Completed-Marketing

Last Year  Current Year

| Jun | Jul | Aug | Sep | Oct | Nov |
|-----|-----|-----|-----|-----|-----|
| 75.8% | 25.5% | -8.8% | -10.4% | -28.4% | -7.7% |
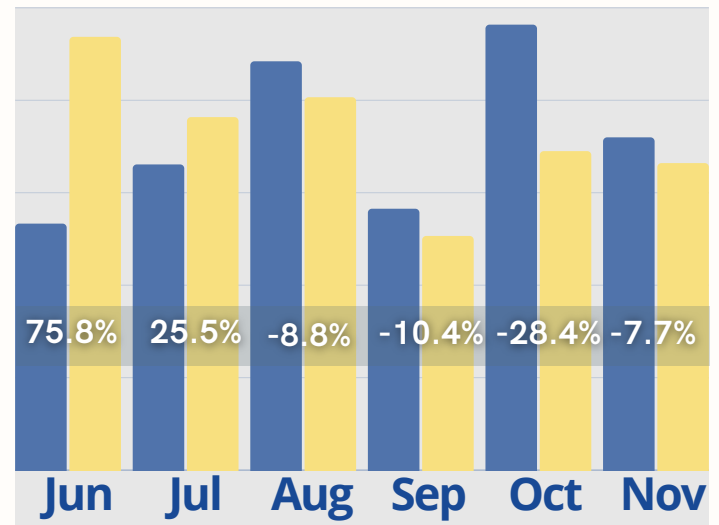
# NOVEMBER LAST 6 MONTHS

## Average Tour to Move-In Conversion Days

Last Year  Current Year

| Jun | Jul | Aug | Sep | Oct | Nov |
|---|---|---|---|---|---|
| -26.1% | -18.3% | 57.8% | -16.8% | -4.2% | -18.1% |
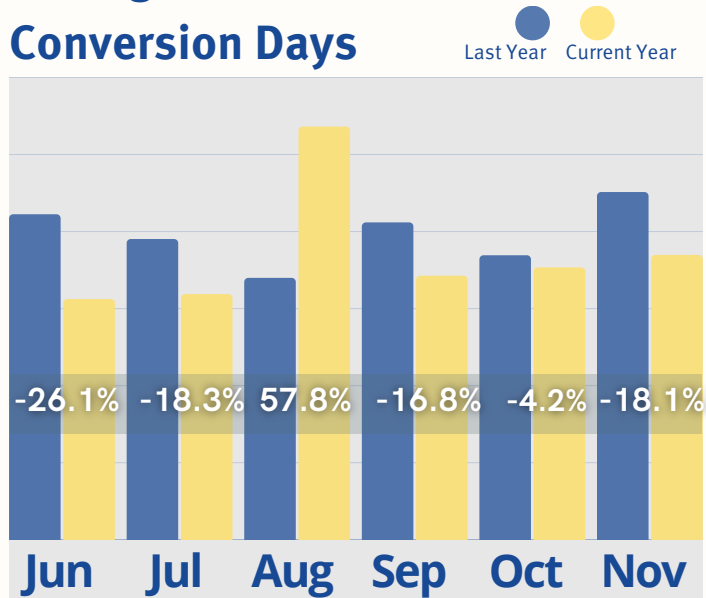
## Residents w/ Assessments

Last Year  Current Year

| Jun | Jul | Aug | Sep | Oct | Nov |
|---|---|---|---|---|---|
| 4.6% | 5.5% | 5.7% | 7.0% | 9.3% | 10.4% |

## Incidents

Last Year  Current Year

| Jun | Jul | Aug | Sep | Oct | Nov |
|---|---|---|---|---|---|
| 6.4% | 6.3% | 2.4% | 28.5% | 9.2% | 12.6% |
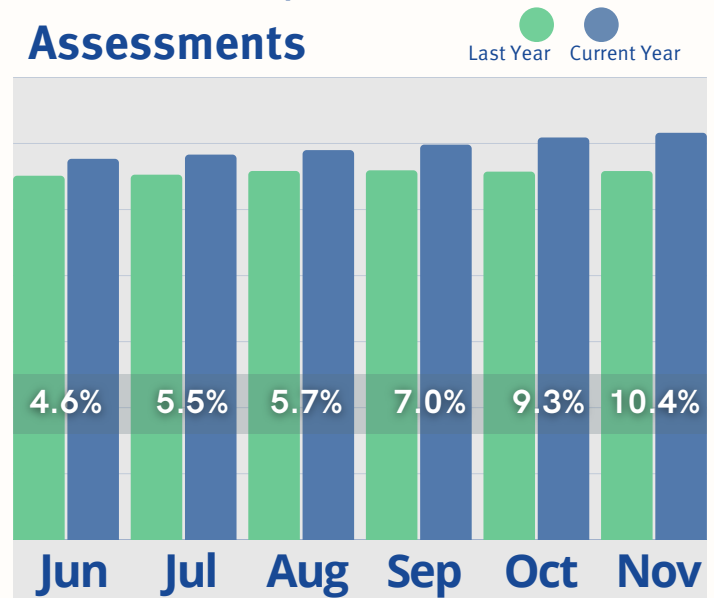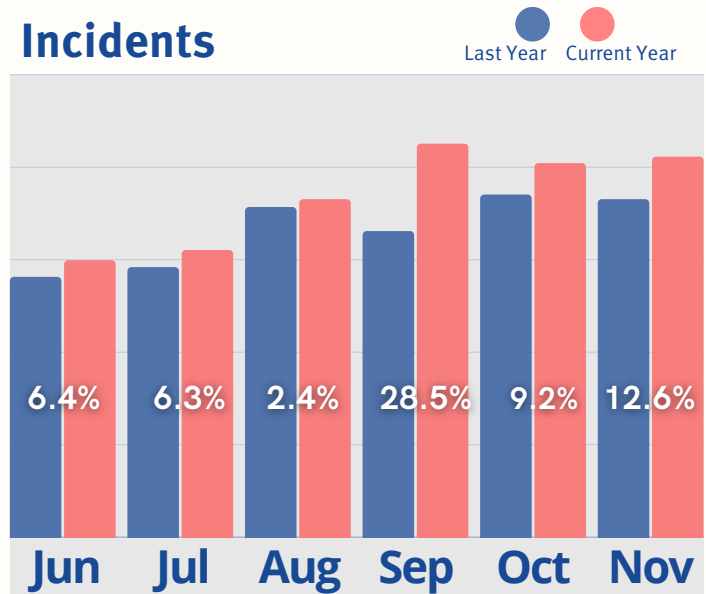
# OCTOBER LAST 6 MONTHS

## Rent Roll Summary-Room Rate



-7.0% | -39.3% | -39.2% | -37.7% | -36.6% | -36.5%
May | Jun | Jul | Aug | Sep | Oct
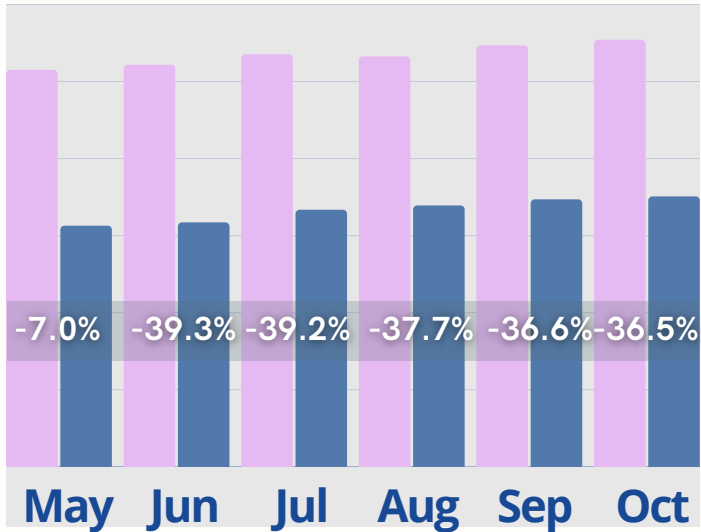
## Rent Roll Summary-Assessment Fee



-2.4% | -45.1% | -44.1% | -42.6% | -41.1% | -38.7%
May | Jun | Jul | Aug | Sep | Oct
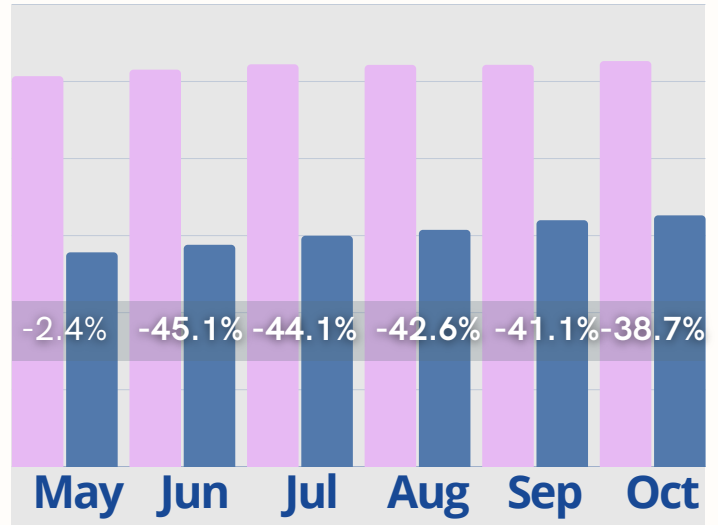
## Rent Roll Summary-Monthly Fees



12.7% | -24.4% | -12.6% | -3.5% | -3.0% | 1.2%
May | Jun | Jul | Aug | Sep | Oct
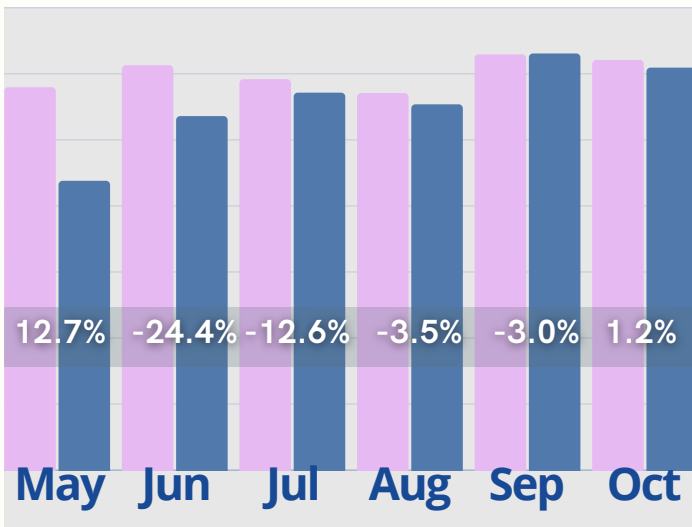
## Rent Roll Summary-Service Fee



46.6% | -45.2% | -37.3% | -49.8% | 69.3% | -33.5%
May | Jun | Jul | Aug | Sep | Oct
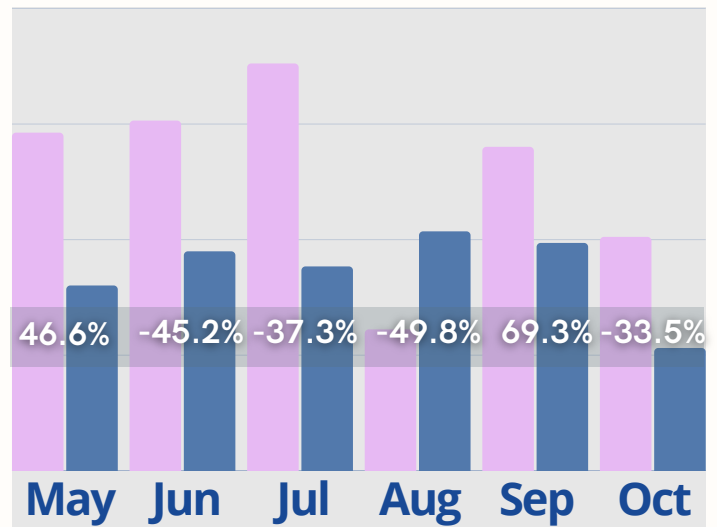
Last Year     Current Year

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