State of the Assisted Living Industry:
Survey of 120 assisted living providers show industry still facing major staffing and economic crisis

June 2022
More than half of assisted living facilities are experiencing worse staffing situations since start of 2022.

Since January 2022, would you say your organization’s overall workforce situation has generally gotten better or worse?

- Much Worse: 24%
- Somewhat worse: 28%
- Stayed the same: 26%
- Somewhat better: 17%
- Much better: 6%

Source: National Center for Assisted Living Survey of 120 Assisted Living Facilities, June 2022
63% of assisted living facilities are facing moderate or high staffing shortages.

What is your current staffing situation?

- Full staffed at facilities: 8%
- Low level of staffing shortages at facilities: 28%
- Moderate level of staffing shortages at facilities: 38%
- High level of staffing shortages at facilities: 25%

Source: National Center for Assisted Living Survey of 120 Assisted Living Facilities, June 2022
87% of assisted living communities are experiencing difficulty hiring staff.

How would you rate your ability to hire new staff?

- Very easy: 4%
- Somewhat easy: 9%
- Somewhat difficult: 44%
- Very difficult: 43%

Source: National Center for Assisted Living Survey of 120 Assisted Living Facilities, June 2022
Nearly all assisted living communities are asking staff to work more. 30% are either limiting new admissions or closing their facilities.

What adjustments have you made due to staffing shortages? (Check all that apply)

- 98% asked current staff to work overtime/extra shifts
- 52% hired temporary agency staff
- 24% limited new admissions
- 6% closed our facility

Source: National Center for Assisted Living Survey of 120 Assisted Living Facilities, June 2022
Over 90% of assisted living communities have increased wages for staff.

In the past year, what strategies have you implemented to try to recruit and retain staff? (Check all that apply)

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased wages</td>
<td>93%</td>
</tr>
<tr>
<td>Strengthened workplace culture</td>
<td>75%</td>
</tr>
<tr>
<td>Promoted staff</td>
<td>55%</td>
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<tr>
<td>Paid for staff training/education</td>
<td>55%</td>
</tr>
<tr>
<td>Offered additional benefits</td>
<td>38%</td>
</tr>
<tr>
<td>Offered bonuses</td>
<td>69%</td>
</tr>
</tbody>
</table>

Source: National Center for Assisted Living Survey of 120 Assisted Living Facilities, June 2022
Lack of interested or qualified candidates and not being able to offer competitive wage with their current financial situation are the top obstacles in hiring new staff.

How big are each of these obstacles in hiring new staff?

- Personal commitments preventing people from entering the workforce:
  - Extremely big: 20%
  - Moderately big: 36%
  - Not an obstacle: 8%

- Lack of interested or qualified candidates:
  - Extremely big: 67%
  - Moderately big: 23%
  - Not an obstacle: 8%

- Can't offer competitive wage with current financial situation:
  - Extremely big: 35%
  - Moderately big: 36%
  - Not an obstacle: 25%

Source: National Center for Assisted Living Survey of 120 Assisted Living Facilities, June 2022
Nearly half of assisted living communities are concerned about having to close over staffing woes.

Source: National Center for Assisted Living Survey of 120 Assisted Living Facilities, June 2022
Nearly 40% of assisted living communities are operating at a loss.

<table>
<thead>
<tr>
<th>Current Operating Situation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating at a loss or negative total margin</td>
<td>37%</td>
</tr>
<tr>
<td>Operating on a total margin between 0-3%</td>
<td>41%</td>
</tr>
<tr>
<td>Operating with a total margin of more than 3%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Source: National Center for Assisted Living Survey of 120 Assisted Living Facilities, June 2022
Assisted living providers estimate their costs have increased by 40% in one year.

By what percentage have your operational costs increased since this time last year?

AVERAGE: 40.0%

Source: American Health Care Association Survey of 759 Nursing Home Providers, May 16-20, 2022
One third of assisted living communities cannot sustain its current pace more than one year.

How long can your facility sustain operating at its current pace?

- More than a year: 65%
- 7-12 months: 22%
- 4-6 months: 10%
- 2-3 months: 3%

Source: National Center for Assisted Living Survey of 120 Assisted Living Facilities, June 2022