

3Q18 NIC MAP Market Fundamentals

	Seniors Housing*			Nursing Care
	Overall	Majority IL	Majority AL	Majority NC
Market Fundamentals 3Q18				
Occupancy	87.9%	90.2%	85.3%	85.9%
Annual Rent Growth	2.9%	3.1%	2.6%	2.4%
Annual Absorption	2.4%	1.6%	3.5%	-0.7%
Annual Inventory Growth	3.4%	2.1%	4.9%	-0.3%
Construction vs. Inventory	6.0%	4.6%	7.7%	0.8%
Rolling 4-Quarter Starts vs. Inventory	2.9%	2.4%	3.6%	0.3%
Capital Markets 2Q18				
Transaction Volume (millions)	\$1,557.7			\$665.5
Rolling 4-Quarter Price Per Unit	\$175,558			\$84,223
Rolling 4-Quarter Cap Rate	7.1%			10.3%

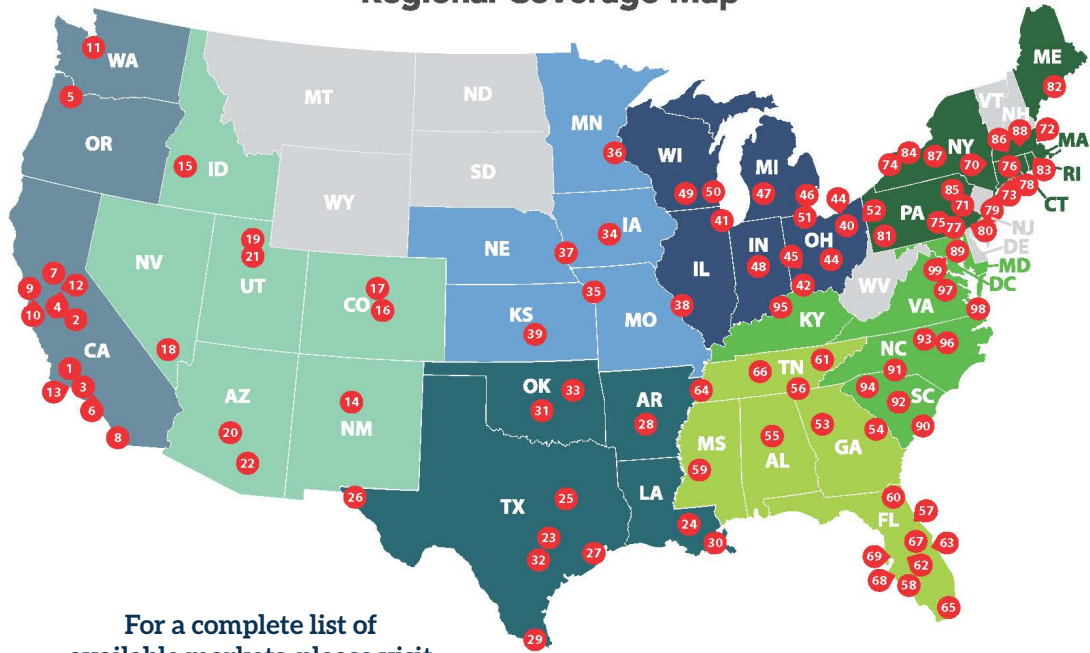
* Overall Seniors Housing combines Majority IL and Majority AL Properties

Source: NIC MAP[®] Data Service

Data for the Market Fundamentals is representative of the Top 31 Primary metropolitan markets.

Data for the Capital Markets is representative of all U.S. property transactions of at least \$2.5 million.

Regional Coverage Map



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For a complete list of
available markets, please visit
www.nic.org/nic-map.

ABOUT NIC MAP

NIC MAP[®] Data Service (NIC MAP) is part of the National Investment Center for Seniors Housing and Care (NIC), a 501(c)(3) organization whose mission is to enable access and choice in seniors housing and care. Established in 2004, NIC MAP tracks and reports seniors housing and nursing care data on more than 15,000 properties within 140 U.S. metropolitan markets.