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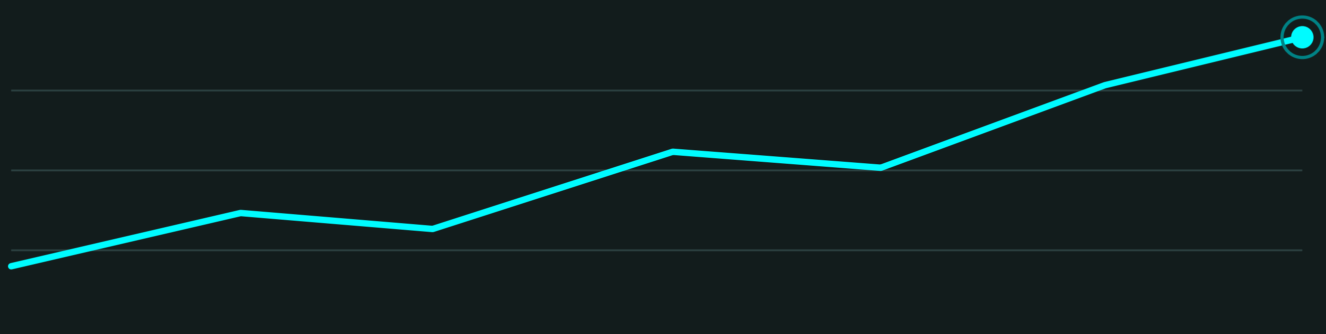
FIELD GUIDE NO. 01 · 2026 EDITION

The Multi-Location Occupancy Playbook

What it takes to fill units, chairs, schedules, tables, and stores when you run more than one location: the breakeven math, the benchmarks by industry, and the marketing system that moves the number that pays for everything else.

SCORING LOCATIONS BY HEADROOM · PRICING OFFERS AGAINST UNIT ECONOMICS · THE PRE-OPEN CALENDAR



ABOUT THIS FIELD GUIDE

Written for the operator who runs the P&L

You run more than one location. Some are full and some are not, and the difference between those two states decides whether the whole portfolio makes money. This guide is about that difference. It is written for owners, CEOs, and general managers of multi-location businesses: senior living communities, med spa groups, clinic networks, restaurant groups, and multi-store service brands.

We use the word occupancy throughout because it is the cleanest name for the thing every one of these businesses sells: capacity. A unit, a chair, a schedule slot, a table, an hour of a provider's day. You have already paid for it. The only question is whether revenue shows up to claim it.

One promise about the numbers

Every statistic in this guide is drawn from a named third-party source: NIC MAP, AmSpa, the National Restaurant Association, MGMA benchmarks, Google consumer research, BrightLocal, and peer academic work on lead response. Each carries a numbered citation, and the full source list is at the back. Where we model a scenario instead of citing one, we label it an illustrative model in plain sight. If a number cannot survive being asked about on a call, it does not belong in a document with our name on it.

What's inside

CHAPTER 01

The one number that runs the business

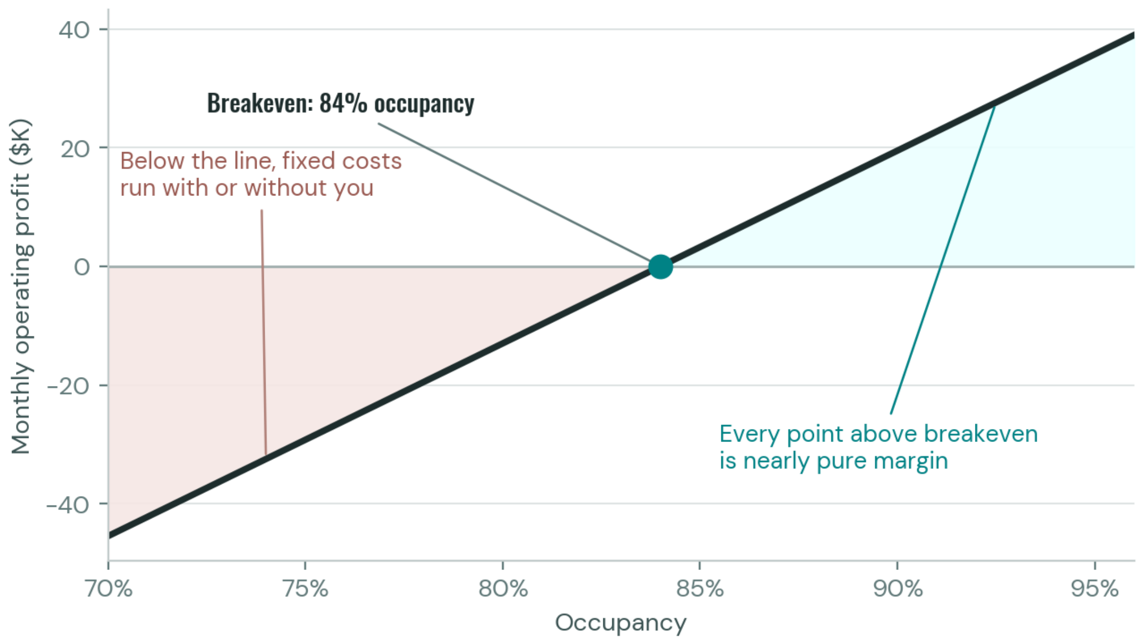
01

Multi-location businesses share a financial personality: heavy fixed costs, thin variable costs. The rent, the debt service, the core staff, the insurance, the software, the lights. Those bills arrive whether the building is full or empty. What changes with each additional customer is small by comparison: some supplies, some incremental labor, some food cost.

That structure creates a line. Below it, every month quietly burns cash. Above it, each additional occupied unit contributes almost entirely to profit, because the fixed costs are already paid. Commercial real estate calls this the breakeven occupancy ratio: the occupancy level at which revenue exactly covers fixed and variable costs.[37] Operators feel it before they can name it. It is why one location at 78% feels like a crisis while its sibling at 91% funds everyone's bonuses.

The math, in one worked example

Take an 80-unit senior living community at the current national average asking rent of roughly $5,800 per month.[5] Assume about 30% of that rate is variable cost per occupied unit, leaving roughly $4,060 of monthly contribution per resident. Set fixed costs where breakeven lands at 84% occupancy, in line with the industry's long-standing mid-80s rule of thumb.[7] Here is what that P&L looks like as occupancy moves. This is an illustrative model, built to show the shape of the curve, not any specific community.



Monthly operating profit vs. occupancy for a modeled 80-unit community. Illustrative model: $5,800 rate, ~30% variable cost, breakeven set at 84%.

Model inputs anchored to NIC MAP average asking rent and industry breakeven conventions. See sources 5, 7, 37.

In this model, one point of occupancy on an 80-unit building is 0.8 residents, worth about $3,250 of contribution per month, or roughly $39,000 per year. Ten points is the difference between losing money and funding your next opening. That is why this guide treats occupancy as a marketing metric, not a finance metric. Finance can report the number. Only demand can move it.

Above the line, the economics turn generous. Stabilized assisted living communities typically run operating margins of 28% to 38%, independent living 35% to 40% and up,[8] and disciplined operators are posting numbers like a 41% margin at 91% occupancy.[10] None of those margins exist at 80%. The margin lives in the last ten points.

UPRYT POV

Most operators manage the cost side of this curve obsessively and leave the demand side to whoever answered the phone. We think that is backwards. Costs have a floor. Occupancy has headroom. The rest of this guide is about the headroom.

CHAPTER 02

The multi-location trap

02

Here is the pattern we see over and over. A portfolio where two locations carry the P&L and the rest coast. Operations look fine everywhere: same playbook, same training, good GMs in place. So why is Lakeside at 91% while Riverbend sits at 79%?

When operations are consistent and outcomes are not, the variable left standing is demand. And demand, at the location level, is a marketing output: local rank, reviews, ads, referral relationships, response speed. The brand is shared, but demand is earned one map pin at a time.

How the fragmentation happens

Nobody plans it. You hired help one need at a time: a firm for the website, a shop for the ads, a freelancer for email, a tool for reviews. Growth multiplied the vendors, and the vendors never met. That is the normal condition of scaling, not a judgment you got wrong. The franchise world quantifies it: 19.3% of franchisees now operate multiple units, together controlling 58.8% of all franchised locations, [36] which makes the average multi-unit operator responsible for roughly six business profiles, six location pages, and six local reputations. Add a different vendor for every discipline and the coordination cost eats your calendar.

High performers behave differently in a measurable way: 94% of high-performing multi-location brands run a dedicated local marketing strategy, versus about 60% of average performers. [35] The mechanics reward it: location-specific pages convert up to 50% better than a generic homepage, [34] because a person searching in one town wants the door in that town.

58.8%
of franchised locations sit with multi-unit operators [36]

94% vs 60%
high performers vs. average with a local strategy [35]

+50%
conversion lift, location pages vs. one homepage [34]

The tell

A fragmented portfolio has a signature: every vendor's report says they are winning, and the P&L says otherwise. If the reporting you receive cannot name occupancy, bookings, or booked revenue by location, it is measuring the vendor's activity, not your business.

UPRYT POV

One firm in the stack usually figured out long ago that a fragmented client is a client who never leaves. Making yourself hard to replace is a skill. It is not the same skill as growing your revenue, and an operator owes loyalty to the occupancy number, not to the vendor who holds the logins.

CHAPTER 03

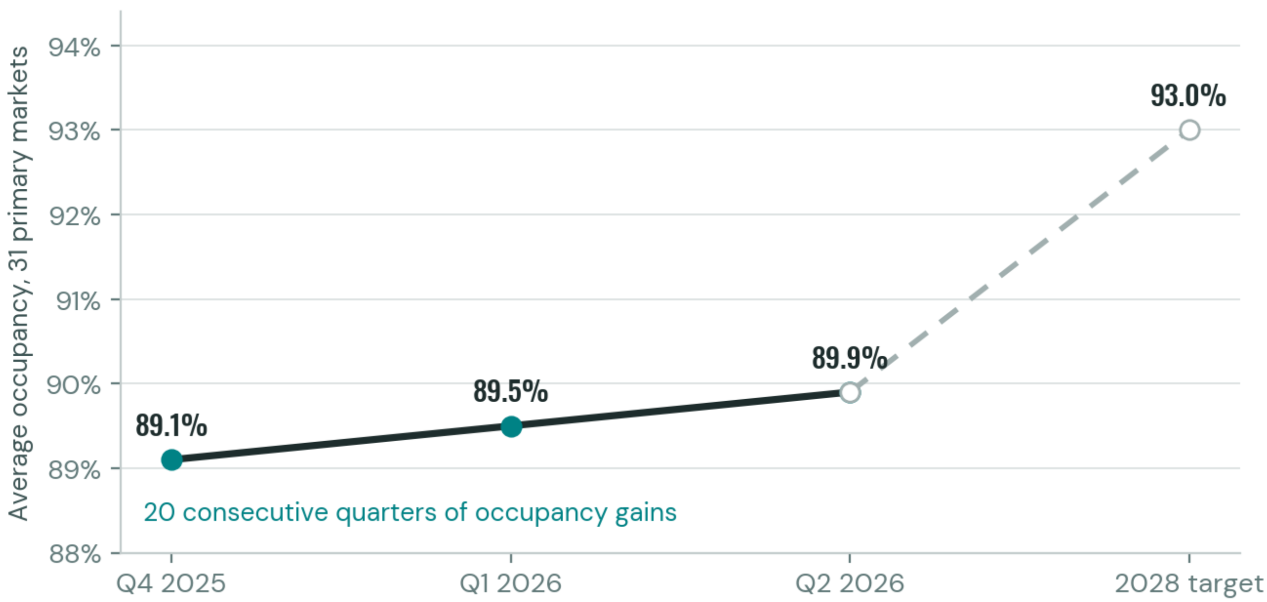
Occupancy, translated

03

The word changes by industry. The math does not. In each of the five worlds below, a heavy fixed-cost base sits under a perishable unit of capacity, and the marketing job is the same: capture the demand that exists in the market before it walks into someone else's building.

Senior living: units and move-ins

Senior living is the purest occupancy business in America right now, and it is having a historic moment. National occupancy hit 89.9% in Q2 2026, the 20th consecutive quarter of gains, with 15 of 31 primary markets at or above 90%.[1] Stabilized communities are already averaging above 90%.[2] Meanwhile new construction sits near its lowest level since 2012 and annual inventory growth hit a record-low 0.4%,[3] while the 80-plus population is projected to double from roughly 15 million to more than 30 million by 2050.[6]

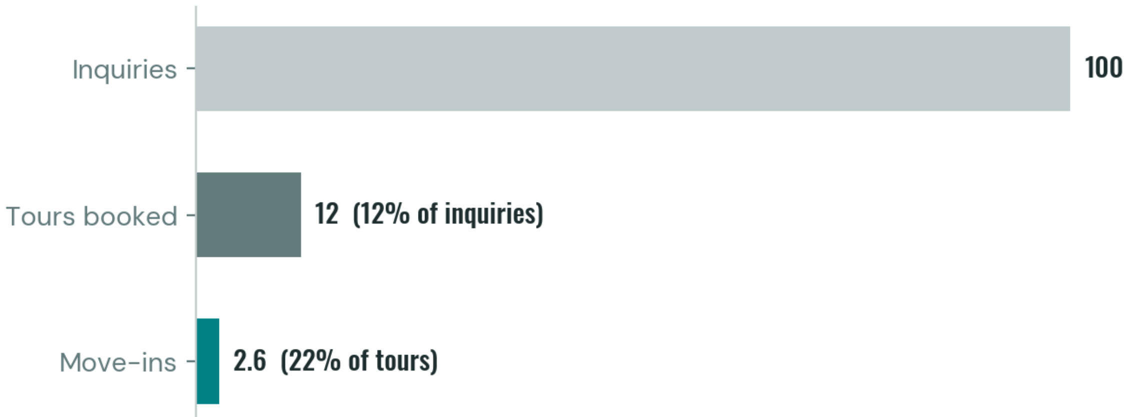


National senior housing occupancy, NIC MAP primary markets. The 2028 figure is NIC MAP's published stabilized-occupancy outlook.

Sources 1, 4. NIC MAP quarterly data; NIC MAP 2026 trends outlook.

Read that chart the way an operator should: the tide is rising, which means a community stuck at 82% has no market excuse. Demand is provably there. What varies is who captures it, and capture is expensive when it is bought retail. The average cost per senior living lead runs about $431 across channels,[11] paid referral agencies now charge $3,500 to $12,000 per move-in,[12] and roughly 60% of leads flow through those referral platforms.[12] Private-pay communities benchmark $3,200 to $4,500 as a healthy cost per move-in.[13]

The funnel explains where the money goes. Industry benchmarks show only about 12% of inquiries ever book a tour, and about 22% of tours become move-ins.[13] One hundred inquiries becomes two to three residents. Every improvement upstream (faster response, better pre-tour nurture, a stronger tour) multiplies through.



The senior living demand funnel at industry benchmark conversion rates.
Source 13. Inquiry-to-tour 12%, tour-to-move-in 22%.

Two more numbers put marketing spend in its true proportion. A resident's lifetime revenue averages around $121,000, so a $4,000 cost per move-in is about a 3.3% acquisition cost,[14] cheap by any industry's standard. And communities that maintain marketing through occupancy dips recover two to three times faster than communities that cut,[15] because the sales cycle runs 70 to 120 days with 8 to 12 family touchpoints,[14] and a paused engine restarts slowly.

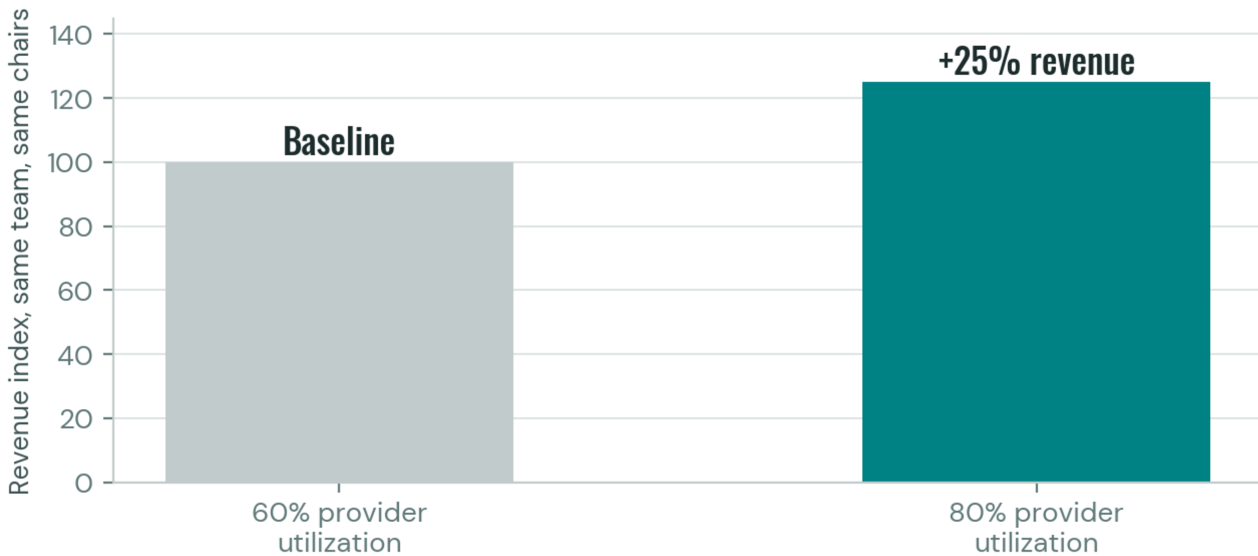
UPRYT POV

The most expensive marketing strategy in senior living is renting your demand from referral platforms at $3,500 to $12,000 a move-in. The cheapest is owning it: local rank, reviews, your own funnel, your own follow-up. Owned demand compounds. Rented demand invoices.

Medical aesthetics: chairs and provider hours

A med spa's occupancy is its providers' calendars. The industry backdrop is strong: medical aesthetics has eclipsed $17 billion and grows by more than $1 billion a year,[18] and the average location's revenue climbed to $1,398,833 in 2024, up from $1,307,587 the year before.[16] The average patient spends about $536 per visit.[17]

But averages hide the operating truth: the difference between a mediocre location and a great one is utilization, not price list. Moving a provider team from 60% to 80% utilization lifts revenue roughly 25% with the same people and the same chairs,[19] which is exactly the fixed-cost leverage from Chapter 1 wearing scrubs. Membership programs push the same direction, generating about 25% higher revenue per patient,[19] because a member's next visit is already sold.



Same team, same chairs: the revenue effect of provider utilization.

Source 19. AmSpa-based operating guidance on utilization and membership.

Acquisition economics reward the disciplined. Meta lead campaigns benchmark $18 to $42 per lead and $65 to $180 per booked consultation,[20] with med spas typically spending 8% to 12% of revenue on marketing.[20] The single biggest free multiplier is response time: practices answering a new lead within 5 minutes are 21 times more likely to convert it than those responding after 30.[20] A dead chair at 2pm is inventory that expired. The marketing job is to sell it before it does.

UPRYT POV

Multi-location med spa groups usually run one location's playbook everywhere and wonder why the newest clinic lags. Each location has its own map pack, its own reviews, its own injector reputations. Treat every address like its own franchise, sharing one brand and one system.

Healthcare clinics: the schedule is the building

A clinic's occupancy metric is schedule utilization, and its silent killer is the no-show. Missed appointments cost the US healthcare system an estimated $150 billion a year, at roughly $200 of lost revenue per empty slot.[21] No-show rates run anywhere from 5% to 30% depending on specialty, while MGMA-benchmarked, well-run practices hold 5% to 7%.[23] For an independent practice the gap is worth $150,000 or more a year.[24]

The damage compounds beyond the empty slot: a patient who no-shows once has an attrition rate near 70%, versus 19% for patients who never miss,[22] meaning one unfilled Tuesday often costs the entire lifetime value of the patient. The fixes are demand-side and unglamorous: multi-touch reminders, frictionless rescheduling, waitlist backfill, and marketing that keeps a queue of new patients ready to claim reclaimed slots. A full schedule forgives; an empty one bills you anyway.

> **UPRYT POV**
>
> Clinic groups measure marketing on new-patient volume and measure no-shows as an ops problem. They are the same problem: demand density. A clinic with a waitlist does not have a no-show problem, it has a backfill routine.

Hospitality: covers and dayparts

Restaurants live the breakeven curve nightly. The National Restaurant Association's State of the Industry research found 73% of restaurants report at least one weekday night running under 60% capacity, [25] usually Monday or Tuesday, while Saturday alone accounts for about 27% of reservations. [26] You pay rent for seven nights and earn it back on four.

The demand is provably movable. Full-service same-store reservations on Monday and Tuesday grew 11% year over year in Toast's data, with Wednesday up 8%, [26] as diners shift to quieter nights. And the operator case study every multi-unit group should study: a New York creperie facing a 45% to 50% Tuesday drop pushed a single-day app offer on an already-popular item, and within six months Tuesday became its strongest weekday, with overall sales up 130% on the promotion's volume. [27] That is daypart marketing doing exactly what Chapter 1 predicts: filling capacity you already paid for.

Retail and multi-site services: comp is a demand story

Stores, gyms, salons, and service brands sell visits, and the visit war is now won in local search. 46% of all Google searches carry local intent, [28] 76% of people who run a near-me search visit a business within 24 hours, and 28% purchase within a day. [28] The shelf life of that intent is measured in hours, which is why a location with a thin Google Business Profile is invisible at the exact moment the decision happens.

Reputation is the other half of comp. 97% of consumers read reviews before choosing a local business, and the share who will only consider businesses rated 4.5 stars or higher keeps rising. [29,30] The discovery layer itself is shifting under operators' feet: consumers using AI tools for local business recommendations jumped from 6% to 45% in a single year, [40] which makes consistent, structured, well-reviewed location data the new storefront.

76%
of near-me searchers visit a business within 24 hours [28]

97%
of consumers read reviews before choosing a local business [29,30]

6% to 45%
one-year jump in consumers using AI for local recommendations [40]

UPRYT POV

Every vertical above has one thing in common: the demand already exists in your market. Nobody has to invent it. The operators who win are simply present, credible, and fast at the moment of decision, at every single address.

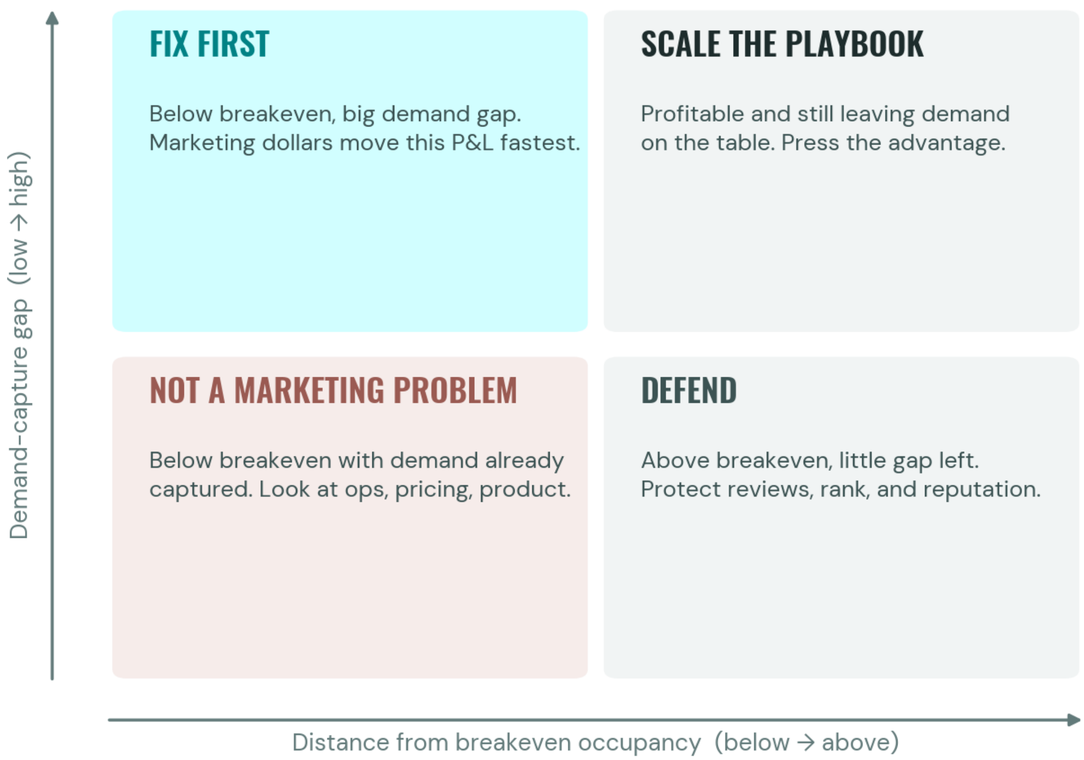
CHAPTER 04

Scoring locations by headroom

04

Portfolio marketing budgets usually get allocated one of two bad ways: evenly, because it feels fair, or loudly, toward whichever GM complains best. Headroom scoring replaces both with two questions per location.

Question one: how far is this location from breakeven occupancy? That is a finance number you already have, or can build with the Chapter 1 math. Question two: how much demand is this location failing to capture? That is a marketing audit: local rank versus competitors, review count and rating gap, share of branded search, referral coverage, response time on inquiries. Score both, place every location on the grid, and the budget argument usually ends itself.



The headroom matrix. Plot every location by distance from breakeven and by unclaimed demand in its market.

How to run it

Signal	Where it comes from	What it tells you
Distance from breakeven	Location P&L: fixed costs, contribution per unit, current occupancy	Urgency. Below the line, every month compounds the problem.
Local rank gap	Map pack position vs. top 3 competitors on money keywords	Visibility at the decision moment; 76% of near-me searches convert to a visit within a day [28]
Review gap	Rating and review volume vs. the local leader	Credibility; consumers increasingly filter at 4.5 stars and up [29]
Response speed	Minutes from inquiry to first human contact	Conversion; 21x qualification odds inside 5 minutes [31]
Referral dependence	Share of move-ins or bookings from paid aggregators	Cost structure; rented demand can run $3,500 to $12,000 per move-in [12]

The matrix also protects you from the classic mistake: pouring marketing into a location whose problem is not demand. A building below breakeven that already captures its market's demand has an operations, pricing, or product problem, and more ad spend will only document the fact faster. Say so out loud. Marketing dollars belong where unclaimed demand exists.

UPRYT POV

We run this scoring in week one of every engagement, and we show the grid to the whole leadership team. Half the value is the budget logic. The other half is that the GMs stop arguing with each other and start arguing with the grid.

CHAPTER 05

Pricing offers against unit economics

05

Discounting fills capacity and can quietly destroy the margin the capacity was supposed to produce. The discipline is one sentence: know your contribution margin per unit of capacity, and never price an offer below the floor where the incremental customer stops contributing.

Three rules keep offers honest

01 Fill dead capacity, never peak capacity

The Tuesday table, the 2pm chair, the ground-floor unit. An offer that shifts a Saturday customer to Saturday at a lower price is a donation. An offer that creates a Tuesday customer is found money, because the fixed costs were already spent. The creperie case in Chapter 3 worked precisely because it aimed at the dead daypart and used an already-loved item as the hook. [27]

02 Price against contribution, not against revenue

In the Chapter 1 model, a unit contributes about $4,060 a month after variable costs. Any offer that nets above variable cost on otherwise-empty capacity is accretive, even when it looks steep next to rack rate. Any offer below variable cost is paying people to occupy your building.

03 Prefer commitment over discount

Membership and package structures raise revenue per patient about 25% in medical aesthetics [19] because they convert a one-time decision into a default. The best occupancy offer is often not cheaper, it is stickier: memberships, series pricing, founding-resident programs at a new opening, corporate and partner rates for off-peak blocks.

And one rule about vendor incentives. Percentage-of-spend pricing means your marketing partner earns more when your ads cost more, which is a strange thing to reward. However you buy marketing, make sure the person recommending the budget does not get a raise for inflating it.

UPRYT POV

Our test for any offer: would the CFO sign it after seeing the contribution math on one page? If the answer requires a story about brand awareness, the offer is not ready.

CHAPTER 06

The pre-open calendar

06

Most groups start marketing a new location the week it opens. By then the ramp is already set, and every empty week of the ramp burns the fixed costs from Chapter 1 at full price. The fix is a calendar that starts the day the lease is signed, so the location opens with a pipeline instead of a hope. The 70-to-120-day sales cycles common in categories like senior living[14] make this arithmetic, not philosophy: if the buying decision takes a quarter, demand generation must start at least a quarter before the doors do.

Window	What ships	Why it cannot wait
Lease signed (day 0)	Location page live with address and offer to join the list. Google Business Profile created and verified. Local citations seeded. Tracking numbers provisioned.	Search engines and AI assistants need weeks to trust a new address. Verification queues are not on your schedule.
Day 15 to 45	Founding-customer offer defined against unit economics. Local partnership and referral outreach begins. Content and photography produced on site.	Commitment-based pre-sales (memberships, deposits, waitlists) convert curiosity into a countable pipeline.
Day 45 to 75	Paid local campaigns live to a pre-open landing page. Review engine ready to fire on the first customers. Staff trained on speed to lead.	Inquiries answered inside 5 minutes qualify at 21x the rate of slow ones;[31] the habit must exist before volume does.
Day 75 to opening	Waitlist converted to booked appointments, tours, or reservations. Opening-week calendar built. Local press and community moments scheduled.	An opening week that starts at meaningful capacity resets the entire ramp curve and the payback period.
First 90 days open	Weekly readout on one page: occupancy or bookings, cost per booked, review velocity, rank movement. Offers tuned to the dead dayparts that reveal themselves.	The first 90 days establish the location's local rank, review base, and habit loops that every later quarter inherits.

The calendar is boring on purpose. Openings fail from sequencing, not from a lack of ideas: the profile that was not verified in time, the reviews that could not exist yet, the ads pointed at a page that was not live. A written calendar that starts at lease-signed converts the opening from an event into a system, which is the only version of it that repeats at location 4 and location 14.

UPRYT POV

We treat a signed lease as the starting gun for demand. If the marketing plan for a new location starts at the ribbon cutting, the ribbon is cutting into the first year's P&L.

CHAPTER 07

The metrics that actually map to occupancy

07

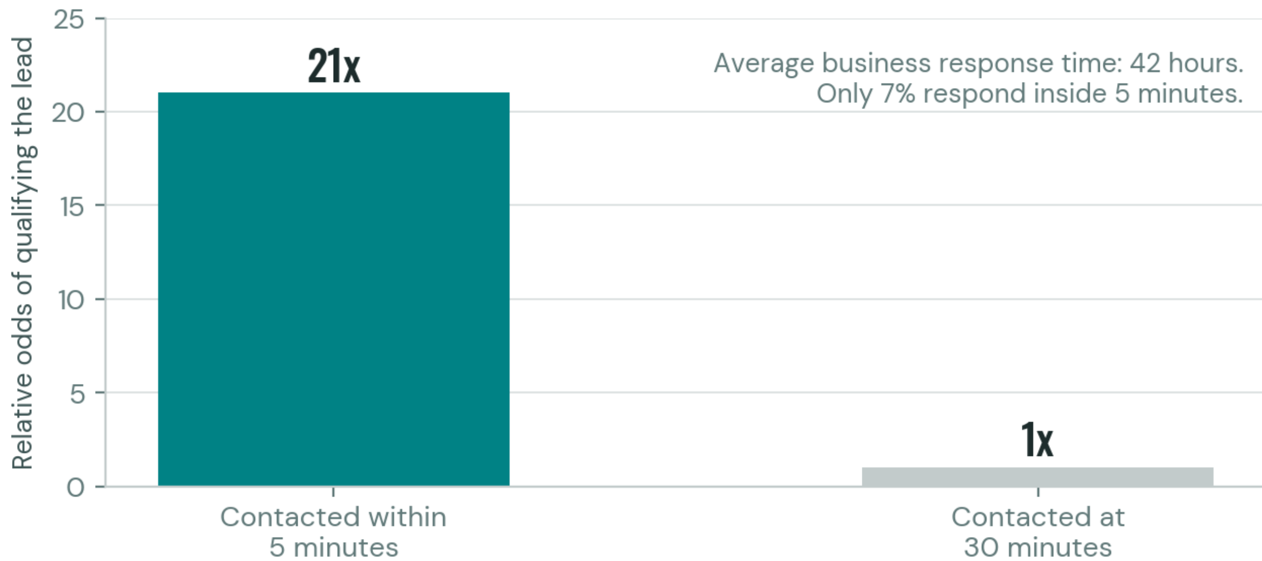
Marketing reporting fails operators in a specific way: it measures activity that is easy to count instead of outcomes that pay rent. Impressions, reach, clicks, even raw leads all flatter the vendor. The chain that matters has four links: demand captured, appointment booked, appointment kept, capacity filled.

Cost per booked and kept

Cost per lead is the most manipulable number in local marketing. Cheap leads that never book are not cheap. The honest unit is cost per booked and kept appointment (or tour, or reservation), because it survives contact with the schedule. In senior living, the gap between a $431 average cost per lead [11] and a $3,200 to $4,500 healthy cost per move-in [13] is the funnel from Chapter 3, and every improvement in booking and show rates moves the second number without touching the first.

Speed to lead

The most underpriced advantage in local business is answering fast. Contacting a new lead within 5 minutes makes you 21 times more likely to qualify it than waiting 30 minutes, [31] responding within the first hour is 7 times better than waiting even one hour more, [32] and 78% of customers end up buying from whoever responded first. [33] Meanwhile the average business takes about 42 hours, [32] and only 7% respond inside the 5-minute window. [33] This is the rare competitive gap that costs attention rather than money.



Relative odds of qualifying a lead by response time.

Sources 31, 32, 33. MIT/InsideSales lead response research; HBR lead response study; industry response-time surveys.

Reviews and rank, tracked like revenue

With 97% of consumers reading reviews before choosing [29,30] and 76% of near-me searches converting to a visit within a day, [28] review velocity and map-pack position per location are leading indicators of next quarter's occupancy. Track them weekly, per address, next to the booking numbers. A location whose rating drifts below the 4.5 filter line is a location whose future demand is already leaking, whatever this month's revenue says.

UPRYT POV

Our reporting rule: every weekly readout ends at a booked, kept, or filled unit of capacity, and every number is per location. If a metric cannot be traced to the schedule or the rent roll, it goes in an appendix, not a headline.

CHAPTER 08

The operator's diagnostic

08

Ten questions to put to your current marketing setup, whether it is in-house, outsourced, or a pile of both. Score one point for every confident yes.

01 Do you know each location's breakeven occupancy?

Not the portfolio's. Each building's. If finance cannot produce it, Chapter 1 can.

02 Can anyone name occupancy, by location, on your marketing team?

If the people spending the demand budget do not know the demand number, they are optimizing something else.

03 Does your reporting end at booked, kept, or filled capacity?

Impressions and leads are inputs. The schedule is the output.

04 Do you know your cost per booked and kept, by channel, by location?

It is the only acquisition number that survives contact with the P&L.

05 Is a human responding to new inquiries inside 5 minutes?

The 21x window.[31] Test it this week: submit a lead to your own location on a Saturday.

06 Does every location have its own page, profile, and review engine?

Location pages convert up to 50% better than a generic homepage,[34] and the map pack is fought address by address.

07 Is your review velocity tracked weekly, per location?

97% of your future customers are reading them first.[29,30]

08 Does a written pre-open calendar start at lease-signed?

If the answer is a launch party plan, Chapter 6 is your template.

09 Do your vendor incentives reward outcomes, not spend?

Percentage-of-spend pricing pays your partner more when your ads cost more.

10 Could you fire any single vendor without losing your own accounts?

If someone else owns the domain, the ad accounts, or the profile logins, you have a landlord, not a partner.

Scoring: 8 to 10, your system is ahead of most of the market; press the advantage. 5 to 7, the leaks are findable and probably concentrated in two or three questions above. 4 or below, the good news is that nothing here requires more budget to fix. It requires an owner.

THE NEXT STEP

Ready when you are. No rush on our end.

Everything in this guide works whether or not we ever meet. Run the breakeven math, score your locations, test your own lead response on a Saturday, and put the diagnostic in front of whoever runs your marketing today. If the answers come back clean, you are in better shape than most of the market and you should keep doing exactly what you are doing.

If they do not, that is usually not a people problem. It is a fragmentation problem, and it is fixable.

WHERE UPRYT FITS

UPRYT is the embedded growth team for multi-location operators. We replace the pile of vendors with one team that plugs in like in-house, owns the number, and runs everything in this playbook as a system: the headroom scoring, the pre-open calendar, the speed-to-lead machine, the review engine, the weekly one-page readout that ends at filled capacity. When you grow, we do not tax it. Your spend going up does not make us cost more, and a new location does not restart the relationship.

THE FIRST STEP IS FREE. We audit what you are running today, per location, against every benchmark in this guide, and hand you the findings. Keep them either way. **upryt.io/audit**

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