# TECHNOLOGY SPENDING
ZIEGLER CFO HOTLINE[SM]

In May, a *Ziegler CFO Hotline*[SM] survey gathered feedback on technology spending among senior living organizations. This survey has been polled every two years since 2012.
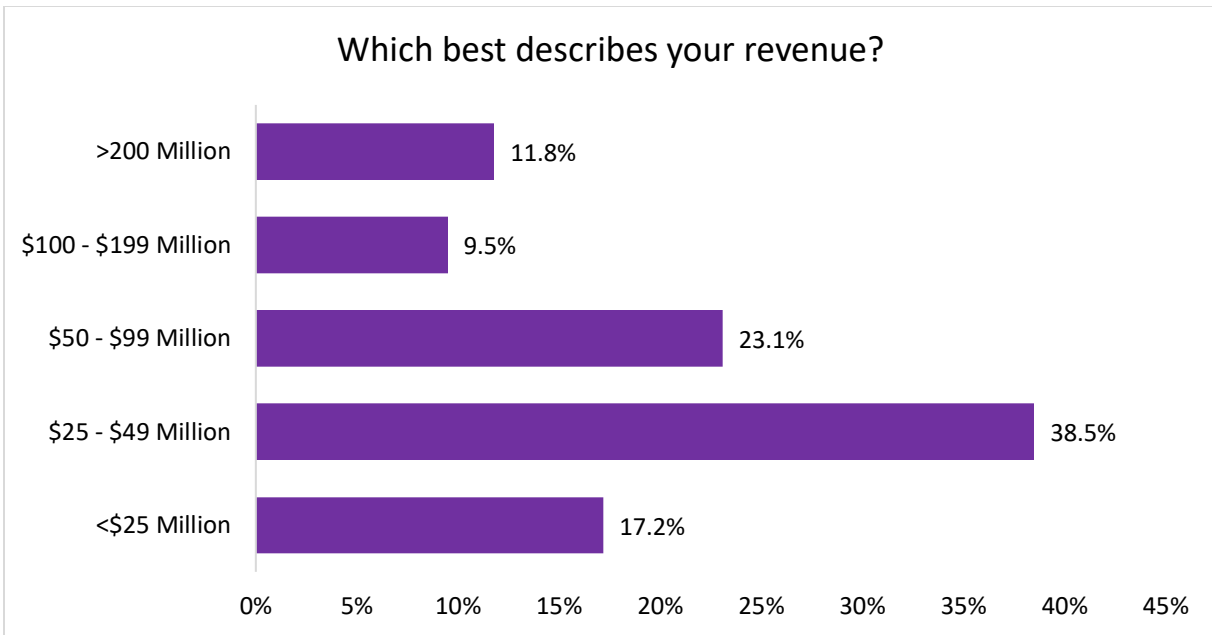
More than 170 organizations participated in this year's survey. Roughly 63% of respondents were single-site organizations and the remaining 36% represented multi-site organizations.
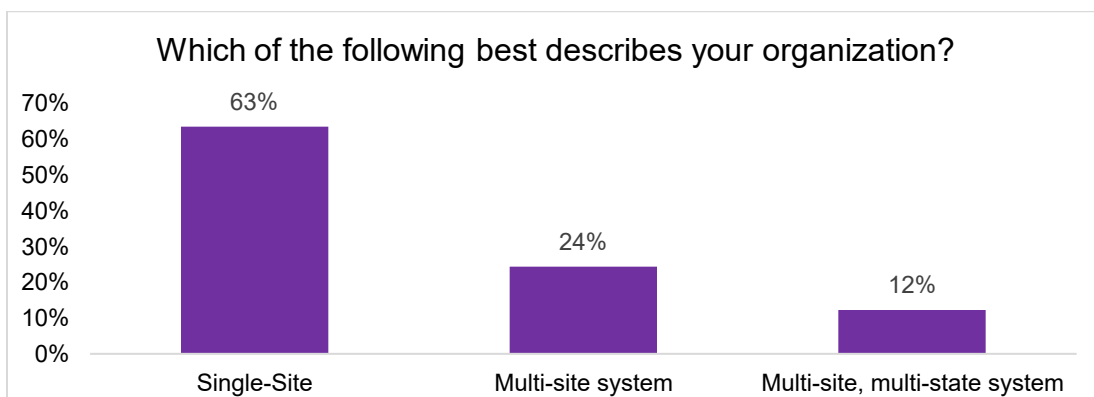
To begin the survey, respondents were asked which state their organization or headquarters was located in. The results below show responses from 38 states, across all regions of the country.
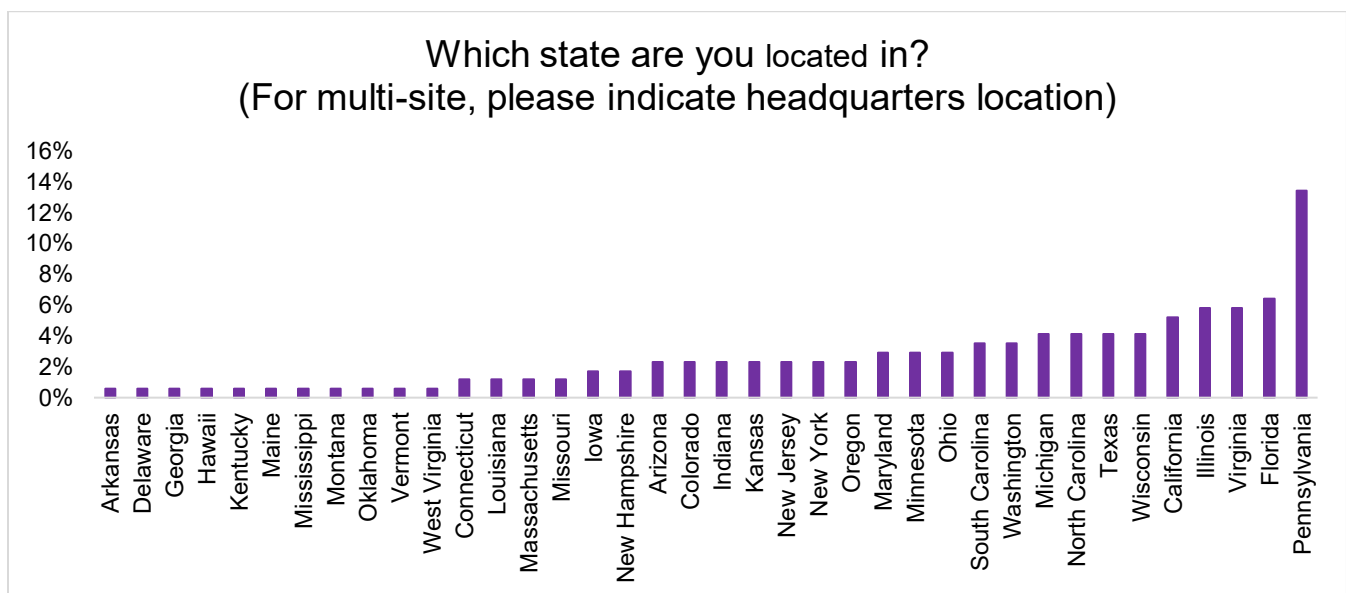
Next, participants were asked to indicate the annual revenue range that best describes their organization. Responses varied, with the most indicating revenue between $25 million and $49 million.

Which best describes your revenue?

Revenue Range	Percentage
>200 Million	11.8%
$100 - $199 Million	9.5%
$50 - $99 Million	23.1%
$25 - $49 Million	38.5%
<$25 Million	17.2%

To continue the survey, respondents were asked to select from a list of technologies that are pertinent to senior living providers and related healthcare organizations. They were asked to identify which of the technologies they invested in over the past 12 months, as well as technologies they had planned to invest in over the next 12 months.

The table below shows the top five technology investments that senior living providers made over the past year compared to the same investments in 2024.

Technology Investments	2025	2024
ICT Infrastructure (high-speed internet connectivity, wired/wireless)	65%	58%
Workforce/Staffing Scheduling Systems	45%	48%
Access Control/Wander Management Systems	42%	44%
Electronic Medical/Health Record Systems (EMR/EHR)	41%	51%
Electronic Point of Care/Point of Service Documentation Systems (POC/POS)	38%	47%

Over the past year, organizations were least likely to have invested in Medication Management Technologies (e.g., medication dispensers, reminder systems, etc.) (10%), Robotic Process Automation (RPA) (9%), and Telehealth/Telemedicine (9%).

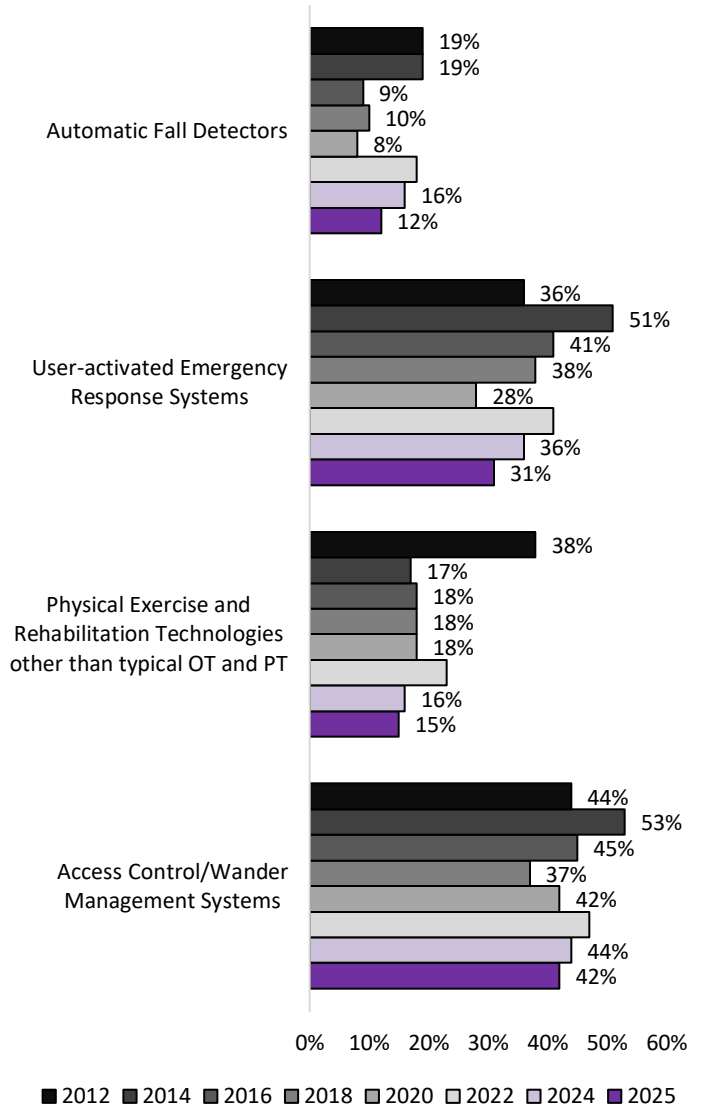The graphs below show comparisons across previous years' *Ziegler CFO Hotline[SM]* reports on technology spending.

Infrastructure/Enterprise-Level

Electronic Point of Care/Point of Service Documentation
- 2012: 45%
- 2014: 57%
- 2016: 49%
- 2018: 42%
- 2020: 31%
- 2022: 51%
- 2024: 47%
- 2025: 38%

Electronic/Medical Health Record Systems
- 2012: 46%
- 2014: 67%
- 2016: 54%
- 2018: 53%
- 2020: 36%
- 2022: 54%
- 2024: 51%
- 2025: 41%

ICT Infrastructure
- 2012: 90%
- 2014: 86%
- 2016: 81%
- 2018: 74%
- 2020: 71%
- 2022: 74%
- 2024: 58%
- 2025: 65%

Legend: ■ 2012 ■ 2014 ■ 2016 ■ 2018 □ 2020 □ 2022 □ 2024 ■ 2025

Monitoring Technologies

Automatic Fall Detectors
- 2012: 19%
- 2014: 19%
- 2016: 9%
- 2018: 10%
- 2020: 8%
- 2022: 16%
- 2025: 12%

User-activated Emergency Response Systems
- 2012: 36%
- 2014: 51%
- 2016: 41%
- 2018: 38%
- 2020: 28%
- 2022: 36%
- 2025: 31%

Physical Exercise and Rehabilitation Technologies other than typical OT and PT
- 2012: 38%
- 2014: 17%
- 2016: 18%
- 2018: 18%
- 2020: 18%
- 2022: 16%
- 2025: 15%

Access Control/Wander Management Systems
- 2012: 44%
- 2014: 53%
- 2016: 45%
- 2018: 37%
- 2020: 42%
- 2022: 44%
- 2025: 42%

Legend: ■ 2012 ■ 2014 ■ 2016 ■ 2018 □ 2020 □ 2022 □ 2024 ■ 2025

Resident-Centric Technology

Technical Support for Residents
- 29%
- 40%
- 36%
- 31%

Video Conferencing Capabilities (SKYPE, etc.) for Residents/Clients
- 29%
- 29%
- 21%
- 19%
- 75%
- 41%
- 18%
- 19%

Resident/Client access to the Internet and Social Networking Sites
- 36%
- 74%
- 48%
- 43%
- 57%
- 41%
- 42%
- 34%

Axis: 0% 10% 20% 30% 40% 50% 60% 70% 80%

Legend: ■ 2012 ■ 2014 ■ 2016 ■ 2018 ■ 2020 ■ 2022 ■ 2024 ■ 2025

Cognitive Fitness/Assistance

Medication Management Technologies (e.g. medication dispensers, reminder systems, etc.)
- 25%
- 15%
- 20%
- 11%
- 16%
- 18%
- 10%

Brain Health/Cognitive Stimulation/Cognitive Training Technologies
- 32%
- 22%
- 20%
- 17%
- 19%
- 14%
- 17%

Axis: 0% 5% 10% 15% 20% 25% 30% 35%

Legend: ■ 2012 ■ 2014 ■ 2016 ■ 2018 ■ 2020 ■ 2022 ■ 2024 ■ 2025

Care Coordination & Staffing

Health Information Exchange Solutions
- 13%
- 13%
- 15%
- 23%
- 14%
- 15%

Shared Care Planning and Care Coordination Tools
- 11%
- 5%
- 6%
- 16%
- 14%
- 14%

Workforce/Staffing Scheduling Systems
- 48%
- 36%
- 47%
- 48%
- 45%

Telehealth/Telemedicine
- 15%
- 15%
- 34%
- 26%
- 16%
- 9%

0% 10% 20% 30% 40% 50% 60%

■2016 ■2018 ■2020 ■2022 ■2024 ■2025
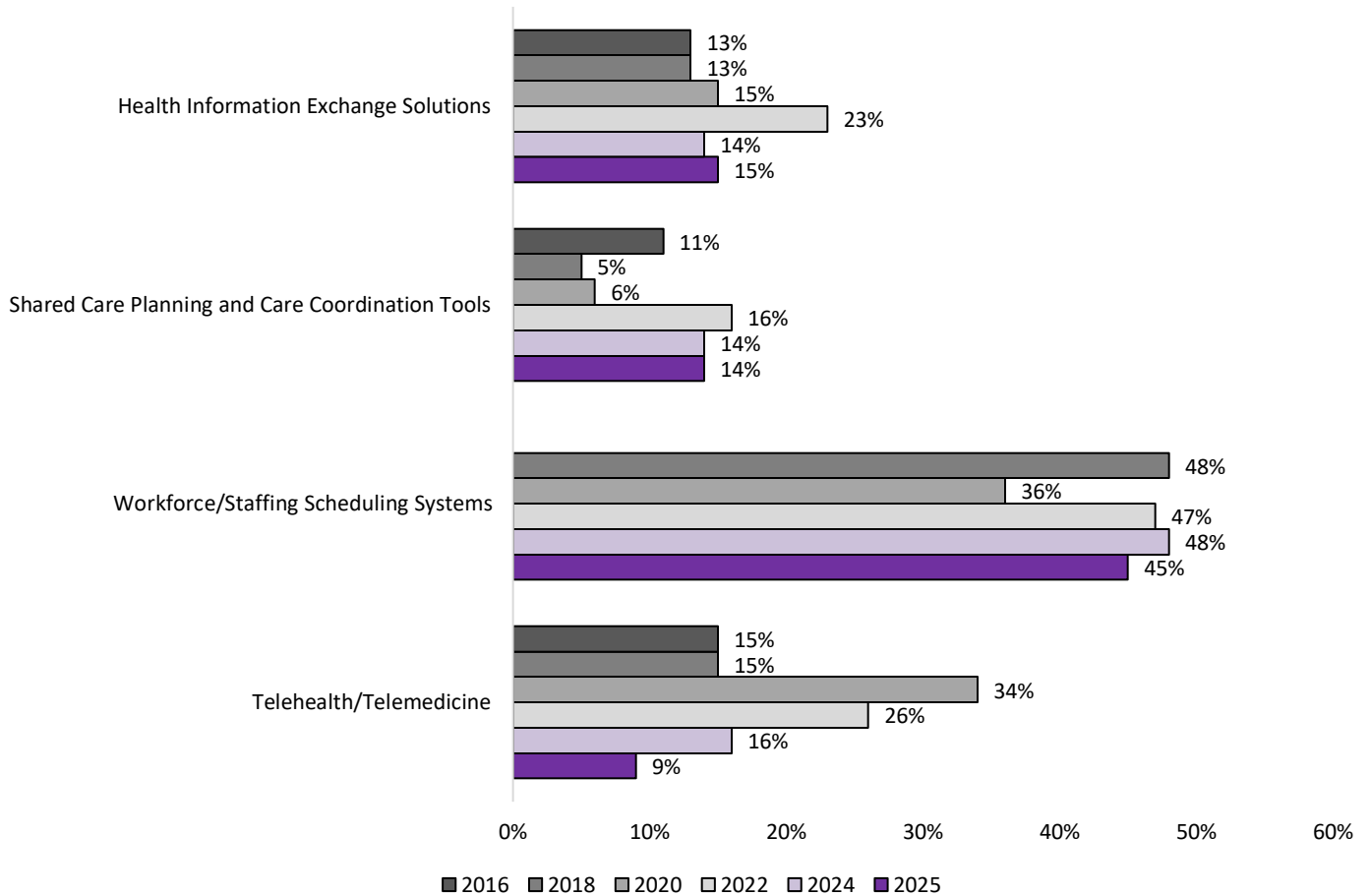
Screening & Infection Control

Infection Control Systems (including Air Purification, Disinfection, and Hand Hygiene Monitoring Technologies)
- 45%
- 41%
- 16%
- 11%

Staff and Resident Screening Technologies
- 40%
- 42%
- 15%
- 14%

0% 10% 20% 30% 40% 50%

■2020 ■2022 ■2024 ■2025

Automation/AI

Data Analytics Tools including Dashboards and Decision Support
- 28%
- 33%
- 38%
- 33%

Robotic Process Automation (RPA)
- 3%
- 9%
- 9%

Physical Robots
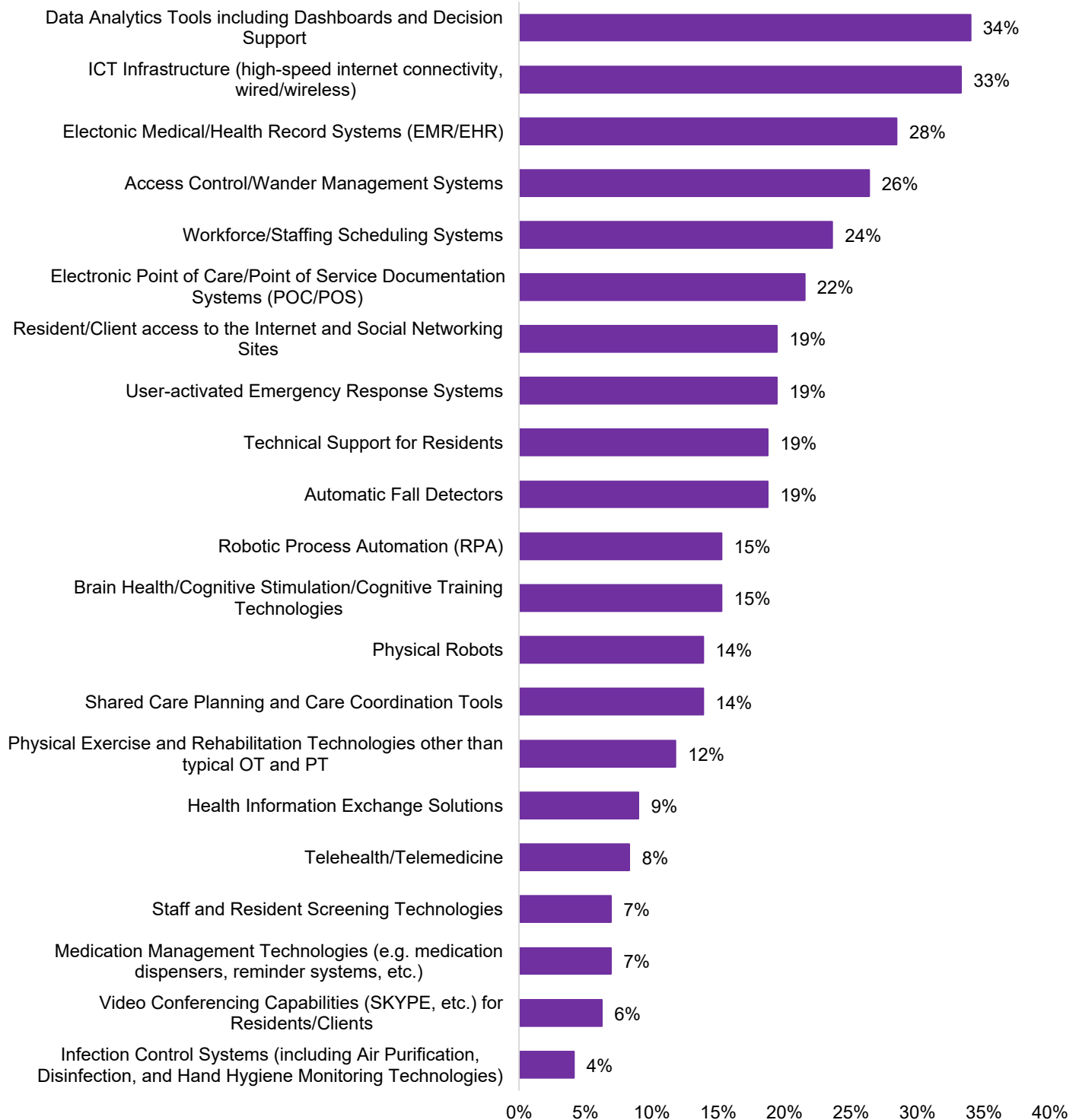- 20%
- 22%

0% 10% 20% 30% 40%

■2020 ■2022 ■2024 ■2025
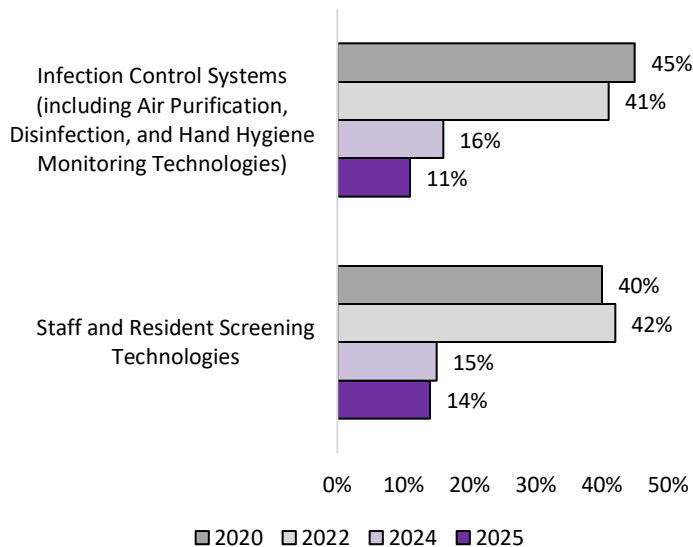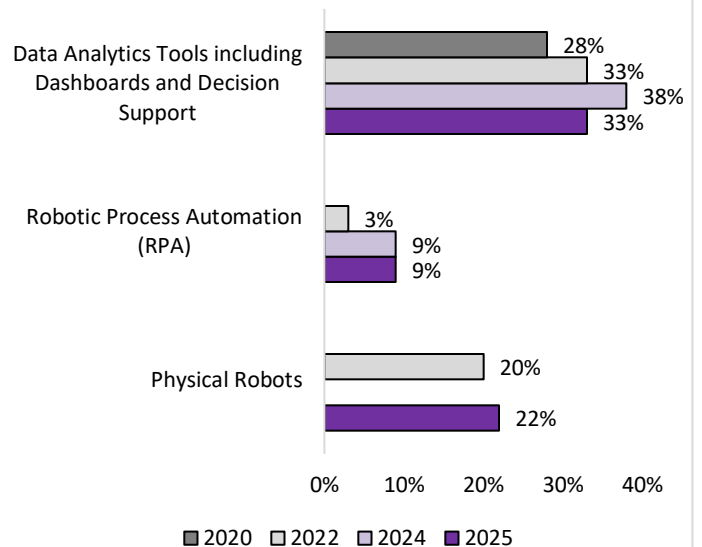
The survey also asked about future spending. Specifically, the respondents were asked to specify whether they plan to invest in various technologies in the year ahead.

Investments in Technologies in the Next 12 Months

| Technology	Percentage
Data Analytics Tools including Dashboards and Decision Support	34%
ICT Infrastructure (high-speed internet connectivity, wired/wireless)	33%
Electonic Medical/Health Record Systems (EMR/EHR)	28%
Access Control/Wander Management Systems	26%
Workforce/Staffing Scheduling Systems	24%
Electronic Point of Care/Point of Service Documentation Systems (POC/POS)	22%
Resident/Client access to the Internet and Social Networking Sites	19%
User-activated Emergency Response Systems	19%
Technical Support for Residents	19%
Automatic Fall Detectors	19%
Robotic Process Automation (RPA)	15%
Brain Health/Cognitive Stimulation/Cognitive Training Technologies	15%
Physical Robots	14%
Shared Care Planning and Care Coordination Tools	14%
Physical Exercise and Rehabilitation Technologies other than typical OT and PT	12%
Health Information Exchange Solutions	9%
Telehealth/Telemedicine	8%
Staff and Resident Screening Technologies	7%
Medication Management Technologies (e.g. medication dispensers, reminder systems, etc.)	7%
Video Conferencing Capabilities (SKYPE, etc.) for Residents/Clients	6%
Infection Control Systems (including Air Purification, Disinfection, and Hand Hygiene Monitoring Technologies)	4%

Survey respondents were asked to identify what percentage of their capital and operating budgets were devoted to these technologies in the past 12 months. The tables below show the average and median figures for the capital and operating budgets, respectively. See the tables below for a year-over-year comparison.

	Percentage <u>Capital</u> Budget Devoted to Technologies						
	2014	**2016**	**2018**	**2020**	**2022**	**2024**	**2025**
Average percent *(TOTAL)*	12.20%	11.80%	10.00%	8.00%	8.30%	8.80%	9.78%
Median percent *(TOTAL)*	9.50%	7.00%	7.00%	5.00%	5.00%	6.00%	7.00%
Average percent *(Single-sites)*	12.10%	11.70%	10.40%	7.20%	9.10%	8.70%	9.90%
Median percent *(Single-sites)*	10.00%	7.00%	7.00%	5.00%	5.00%	5.00%	7.90%
Average percent *(Multi-sites)*	12.20%	11.80%	9.70%	9.30%	7.10%	8.90%	9.44%
Median percent *(Multi-sites)*	8.00%	7.00%	5.00%	5.00%	5.00%	8.00%	7.00%

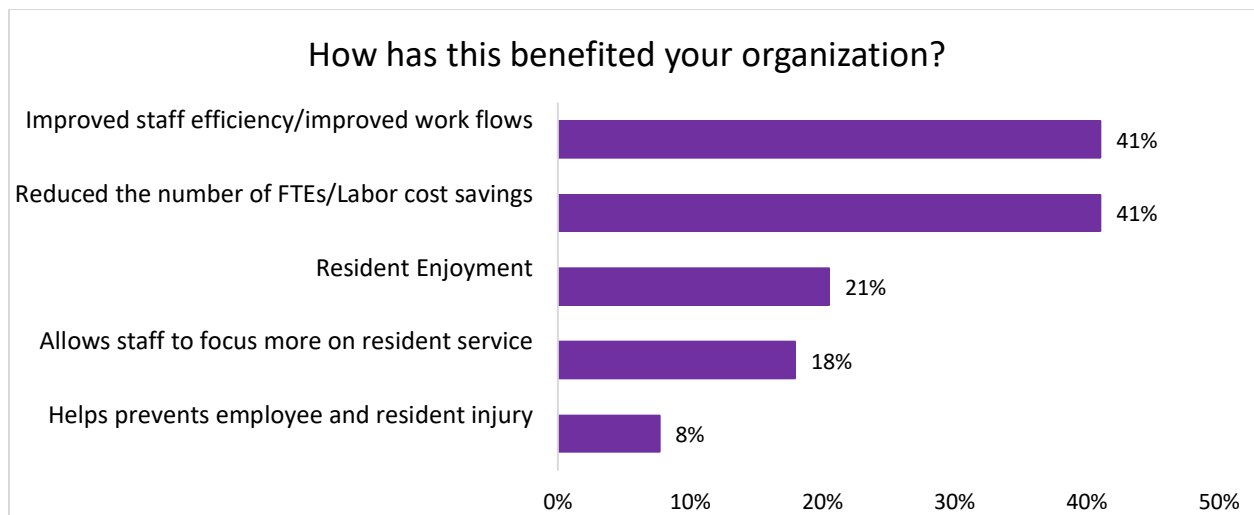|	Percentage <u>Operating</u> Budget Devoted to Technologies						
	2014	**2016**	**2018**	**2020**	**2022**	**2024**	**2025**
Average percent *(TOTAL)*	2.70%	2.50%	3.20%	3.00%	3.40%	3.50%	3.80%
Median percent *(TOTAL)*	2.00%	2.00%	2.00%	2.00%	2.00%	2.40%	3.00%
Average percent *(Single-sites)*	2.50%	2.40%	3.50%	2.50%	3.50%	3.70%	3.90%
Median percent *(Single-sites)*	2.00%	2.00%	2.00%	2.00%	2.00%	2.80%	3.00%
Average percent *(Multi-sites)*	2.90%	2.60%	2.80%	3.90%	3.30%	3.10%	3.60%
Median percent *(Multi-sites)*	2.00%	2.00%	2.00%	2.40%	2.00%	2.00%	3.00%

Respondents were asked whether they currently utilize robotic technology. The chart below shows that 67% of organizations use it, which is a significant increase from 2024.


Does your organization utilize robotic technology?

No, 33%

Yes, 67%
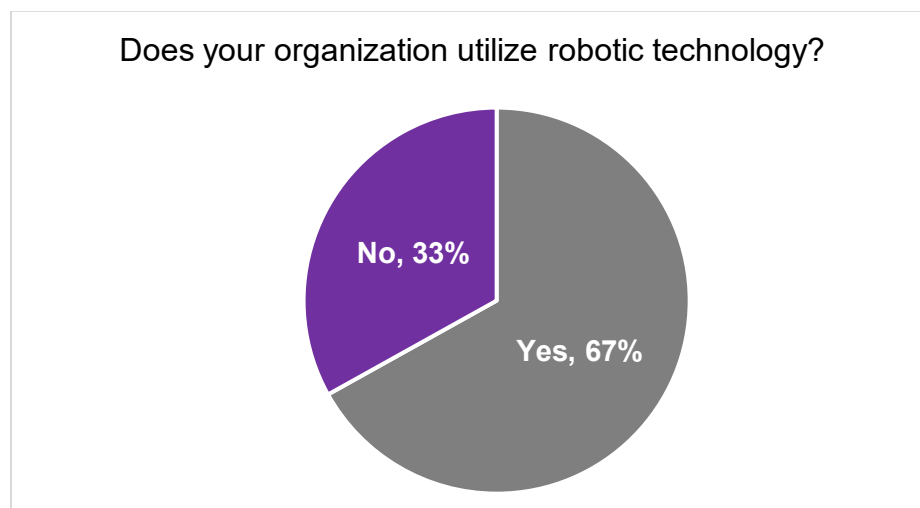
Of those who said "yes," the vast majority utilize robots for **dining services** such as serving food and bussing tables. A few mentioned other uses such as **cleaning/housekeeping**, **lawn care**, and **robotic process automation (RPA)**.

What do you use this technology for?

- RPA, 5%
- Lawn Care, 5%
- Cleaning/Housekeeping, 39%
- Dining Services, 70%
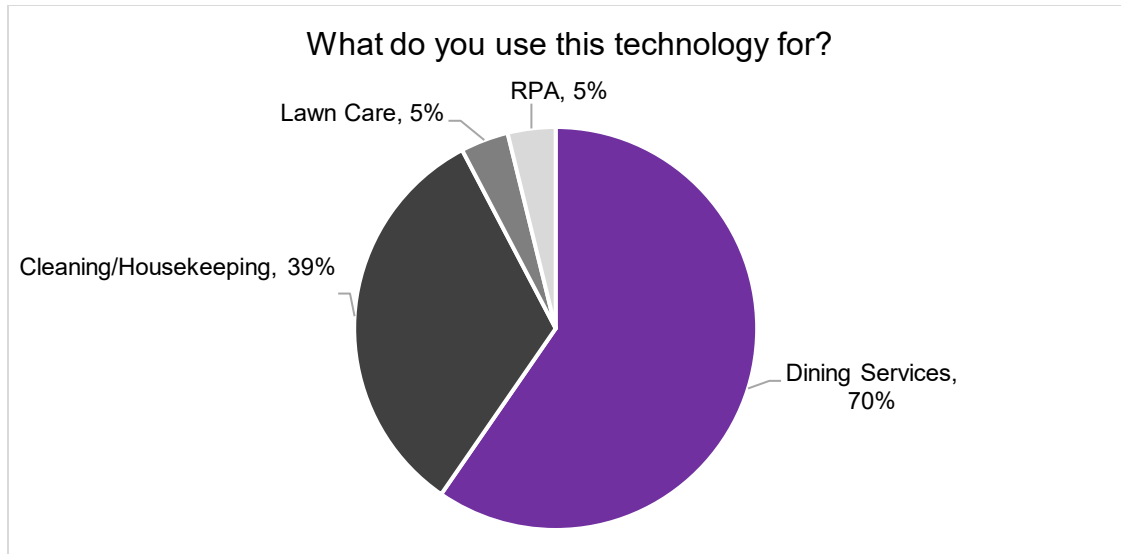
When those same people were asked how AI has benefited their organizations, the most common response was **improved efficiency and workflows for staff, as well as a reduction in the number of Full Time Employees (FTEs) and hourly labor cost savings.** They also mentioned that residents really **enjoy the use of robotic technology as it allows staff to focus more on personal service to residents.**

How has this benefited your organization?

Benefit	Percentage
Improved staff efficiency/improved work flows	41%
Reduced the number of FTEs/Labor cost savings	41%
Resident Enjoyment	21%
Allows staff to focus more on resident service	18%
Helps prevents employee and resident injury	8%

Those who answered "no" to the question regarding AI robotic technology were then asked if they had plans to implement it eventually. Roughly 69% said they had no plans to do so in the future.

Do you plan on implementing this technology in the future?
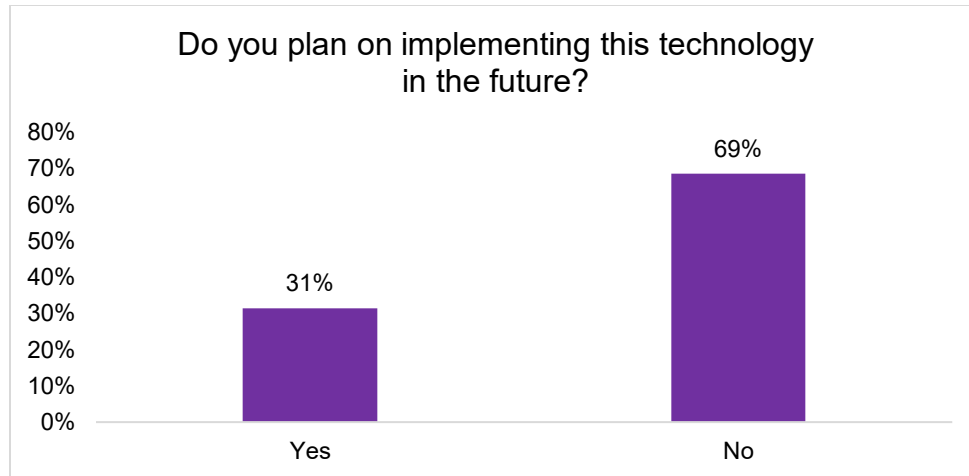
Lastly, the survey allowed for open-ended comments to be made. Below is a sampling of those comments, which may be edited for length or minor grammatical changes.

- *We aim to leverage secure, scalable, and sustainable technology that enables the business to better-serve our mission statement.*
- *We are currently putting together an IT strategic plan as we know AI will be part of our future in the coming years*
- *We are placing a larger focus on looking at choosing best-in-class and systems integration*
- *We don't have a lot of funds, but we are watching closely to see where it might reduce FTE since the labor market is so difficult.*
- *We are always looking at new technology to achieve efficiency and better outcomes for employees and residents, maintain current infrastructure*

The senior living organizations' responses included in this report have been collated without verification of the accuracy of the data/comments therein. The results provided do not express an opinion of nor can they be guaranteed by Ziegler.

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