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**17TH ANNUAL LEADINGAGE ZIEGLER 200 REPORT RANKS
NOT-FOR-PROFIT SENIOR LIVING PROVIDERS,
SHARES OUTLOOK ON INDUSTRY TRENDS**

CHICAGO, IL – OCTOBER 27, 2020 – Ziegler, one of the nation’s leading underwriters of financings for not-for-profit senior living providers, and LeadingAge, the nation’s largest association of not-for-profit aging service providers in the country, today released the 17th Annual LeadingAge Ziegler 200 (LZ 200) report.

This report is a ranking and analysis of the nation’s 200 largest not-for-profit senior living organizations across the country as of December 31, 2019. This year’s report represents more than 300,000 market-rate units and nearly 1,600 market-rate communities across the country. It also outlines relevant business trends in the industry to showcase the variety of older adult services and offerings provided in this sector.

“Since beginning the LZ 200 report 17 years ago, our members have driven change and innovation” said Katie Smith Sloan, president and CEO of LeadingAge. “This year’s report demonstrates the significant role that LeadingAge members play in the aging services field and highlights the latest trends in our field, like the continued increase in memory care offerings and the importance of resident engagement. Through this report, the entire sector can understand the latest technologies, services, and growth opportunities that are driving our field forward.”

The 2020 LZ 200 listing shows that senior living providers have grown primarily through community expansions from existing campuses. Nearly 30 percent of the total number of units for all senior living systems in the LZ 200 are represented by the 10 largest providers.

The 2019 top 10 largest not-for-profit multi-site senior living organizations include:

1. National Senior Campuses – Wellesley Hills, MA
2. The Evangelical Lutheran Good Samaritan Society – Sioux Falls, SD
3. ACTS Retirement Services, Inc. – West Point, PA
4. Ascension Senior Living – St. Louis, MO
5. Presbyterian Homes and Services – Roseville, MN
6. Trinity Health Senior Communities – Livonia, MI
7. HumanGood – Pleasanton, CA
8. Covenant Living Communities & Services – Skokie, IL
9. Lifespace Communities Inc. – Des Moines, IA
10. Benedictine Health System – Duluth, MN

The LZ 200 also showed that in the last 10 years, the average annual growth rate in total units was 2.5 percent, with independent living and assisted living units growing each year but decline in the number of nursing care beds.

Other key areas of senior living industry trends, notable growth and innovation include:

- Roughly 65 percent of the LZ 200 reported intentions to expand or reposition an existing campus in 2020 or 2021. About 26 percent of the LZ 200 reported that they intend to grow via the construction of new communities while 28 percent responded ‘maybe’ to this type of growth in 2020 or 2021. 10 percent reported that they intend to grow from affiliation while 33 percent may consider affiliation in 2020 or 2021.
- Similar to last year’s LZ 200 report, memory care units are becoming an increasingly important component of the annual unit counts with 73 percent of the 2020 LZ 200’s listing offering specialized memory care units.
- Home-based services, such as home health, home care, adult-day care, continuing care at home (CCaH) programs and Program for All-Inclusive Care for the Elderly (PACE), continue to grow with approximately 51 percent of the 2020 LZ 200 offering some type of home and community-based service to non-residents, this is up one percent over the 2019

LZ 200. However, the CCaH model, which had gained popularity in the past, is now offered by slightly more than 10 percent of the LZ 200, this is one percent more than the 2019 LZ 200.

- Adoption of new technologies increased over 2019 by five percent, as 80 percent of providers use electronic point of care/point of service documentation systems, and more than 75 percent implement electronic health/medical records. Adoption is generally lower for health and wellness technologies, such as medication monitoring or telehealth remote monitoring; and care/case management and coordination reveals that 60 percent of providers use this software.
- Social connectedness/resident engagement, a new technology category added in the 2019 LZ 200, reveals that 61 percent of providers use this technology, which is up from 49.5 percent in 2019. New this year, 31 percent of system providers utilize more advanced analytical tools. The adoption of social connectedness/resident engagement technology is notable in response to the COVID-19 pandemic, enabling safe engagement and social connectedness during safety isolation measures for residents.
- Formal joint venture engagements marginally increased this year by one percent with nearly 34 percent of LZ 200 organizations reported to be engaged in a formal joint venture, most commonly with another provider, a health system or a home health/home care agency. Four out of 10 of the providers also indicated that they are engaged in a formal contract related to health care reform, whether it be an Accountable Care Organization (ACO) or a bundled payment agreement. This figure has grown steadily over the past from roughly 25 percent in 2013 to 48 percent in 2019.

“This LZ 200 report is one of our most important publications in helping inform the senior living & care industry during such a critical year,” said Dan Hermann, President & Chief Executive Officer and Head of Investment Banking at Ziegler. “As the industry strives to provide the best care during the COVID-19 pandemic, these insights on the largest not for-profit senior living organizations provide an opportunity for providers and industry stakeholders to further adapt to this challenging

moment and provide the highest quality of care and amenities for seniors when it is vitally needed today. Our hope is that this LZ 200 can provide value and perspective for the entire industry.”

The LZ 200 report is developed annually through a partnership between Ziegler and LeadingAge. It includes more than 200 providers of multi-site systems, more than 150 single-site campuses, and government-subsidized multi-site housing providers. Previously known as the LZ 100 and LZ 150, the report was expanded in 2014 from LZ 100 to the LZ 150 and to the LZ 200 in 2018 in response to the growing industry and increasing interest.

To view the full report, please [click here](#).

About Ziegler:

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