

25<sup>th</sup> ANNIVERSARY



# Transformations: What's Happening in the Market and What it Means for You

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# Agenda

- For Openers...
- The Big Trends and What They Mean
  - Here They Come
  - Aging (not so) Gracefully
  - A New Breed
- Our Conclusions
- Back to *the* Question...

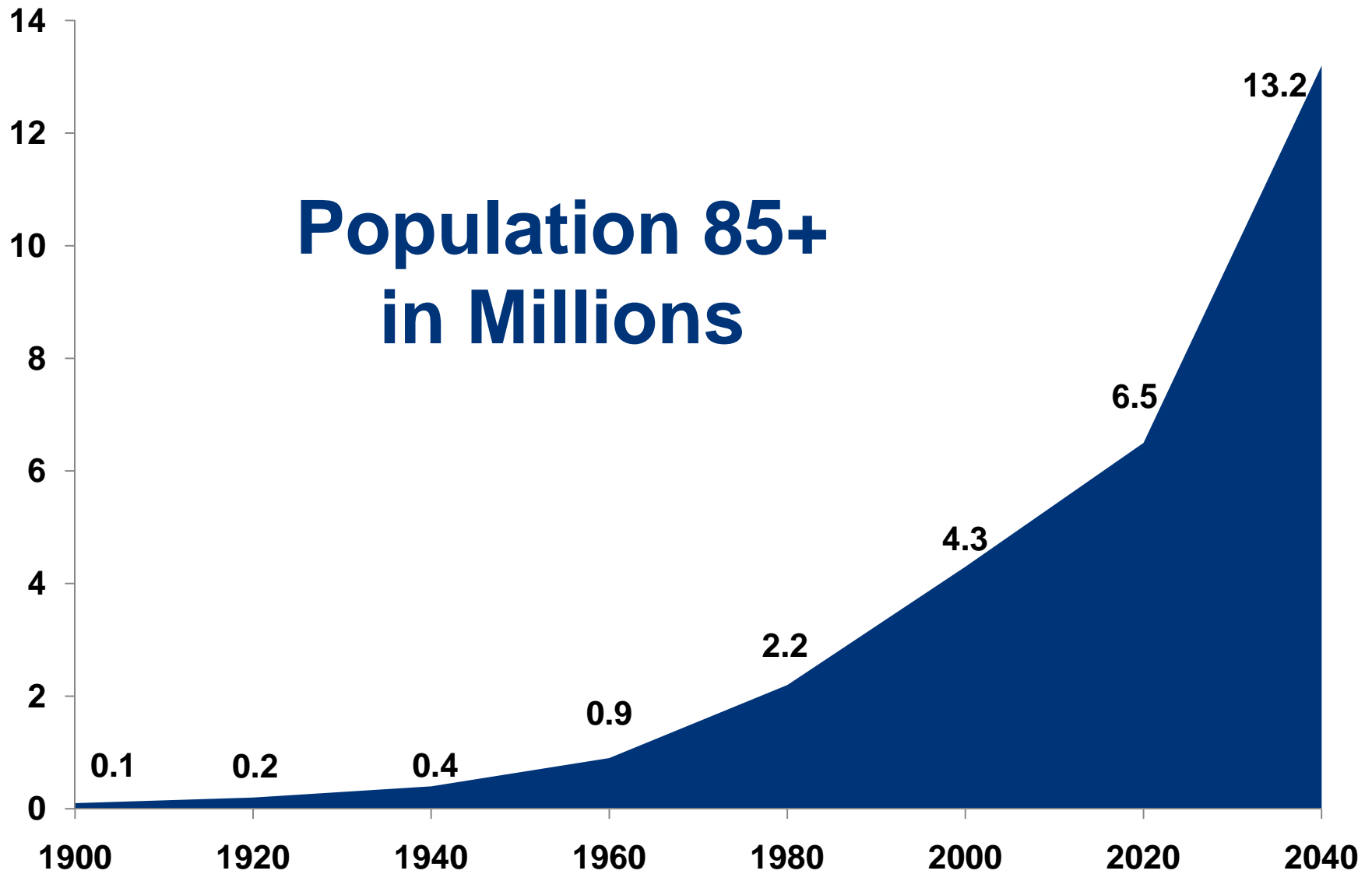
# First, a Question

*When* are you  
spending your time?

# What's the Perspective?

- 15,000 Assisted and Independent customers
- Hundreds of renovation and new construction projects
- Industry involvement and partnerships

# Trend 1: Here They Come

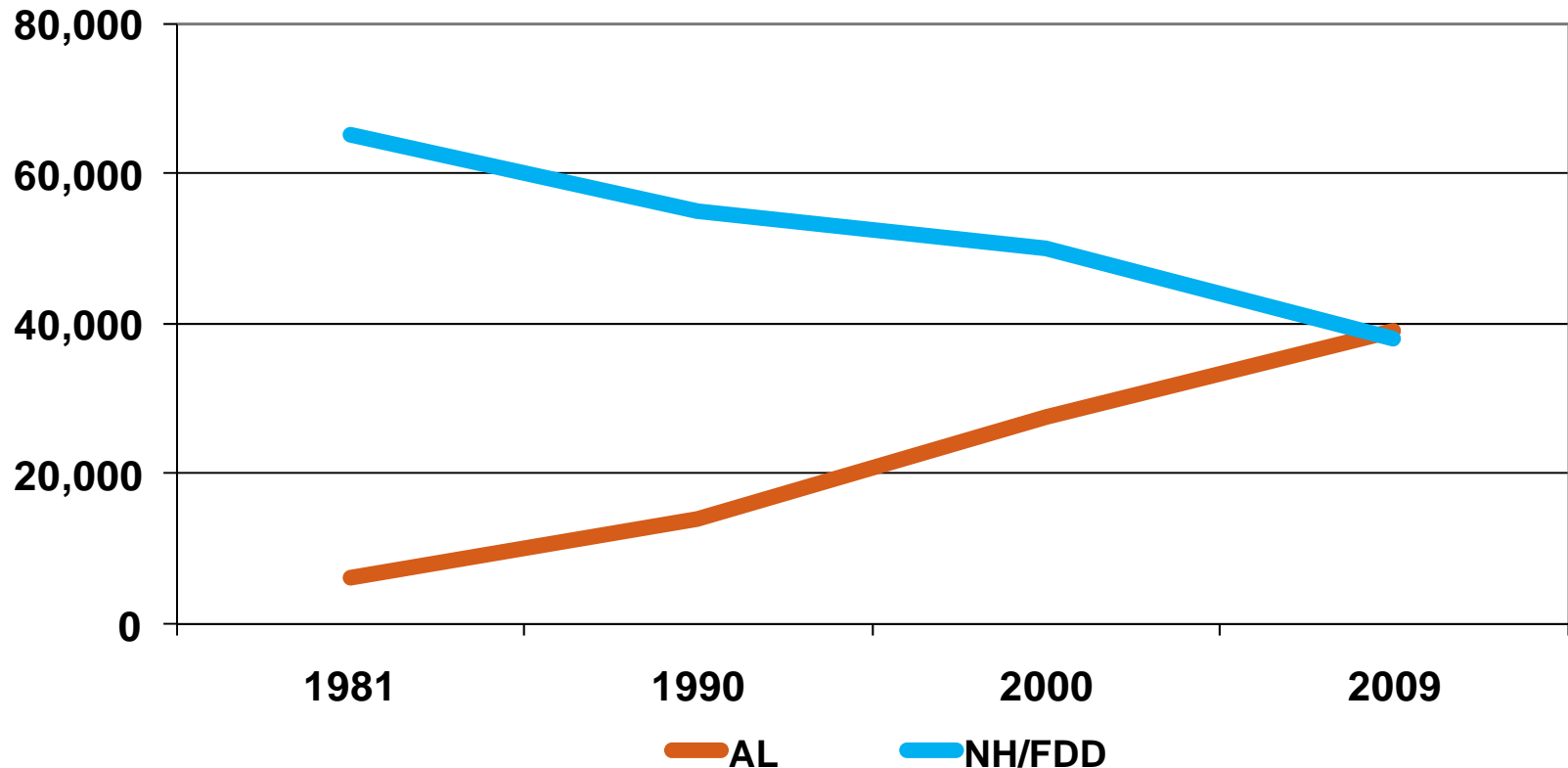


# What Does it Mean?

- Demographics will overcome short term market conditions
- New market segments emerging
- Your competition may not be who you think

# Trend 2: Aging (not so) Gracefully

Wisconsin Example  
Shift From SNF Beds to AL Units/Apts



# What Does it Mean?

- Renovation investments rising
  - “Paint and paper” not enough
  - Neglected properties being repositioned
- Market expectations being reset
- Strategic and capital planning more important than ever

# Trend 3: A New Breed



# What Does it Mean?

- What services are required?
- He may not be as rich as you think
- Who is he comparing you to?

# What's the Comparison?



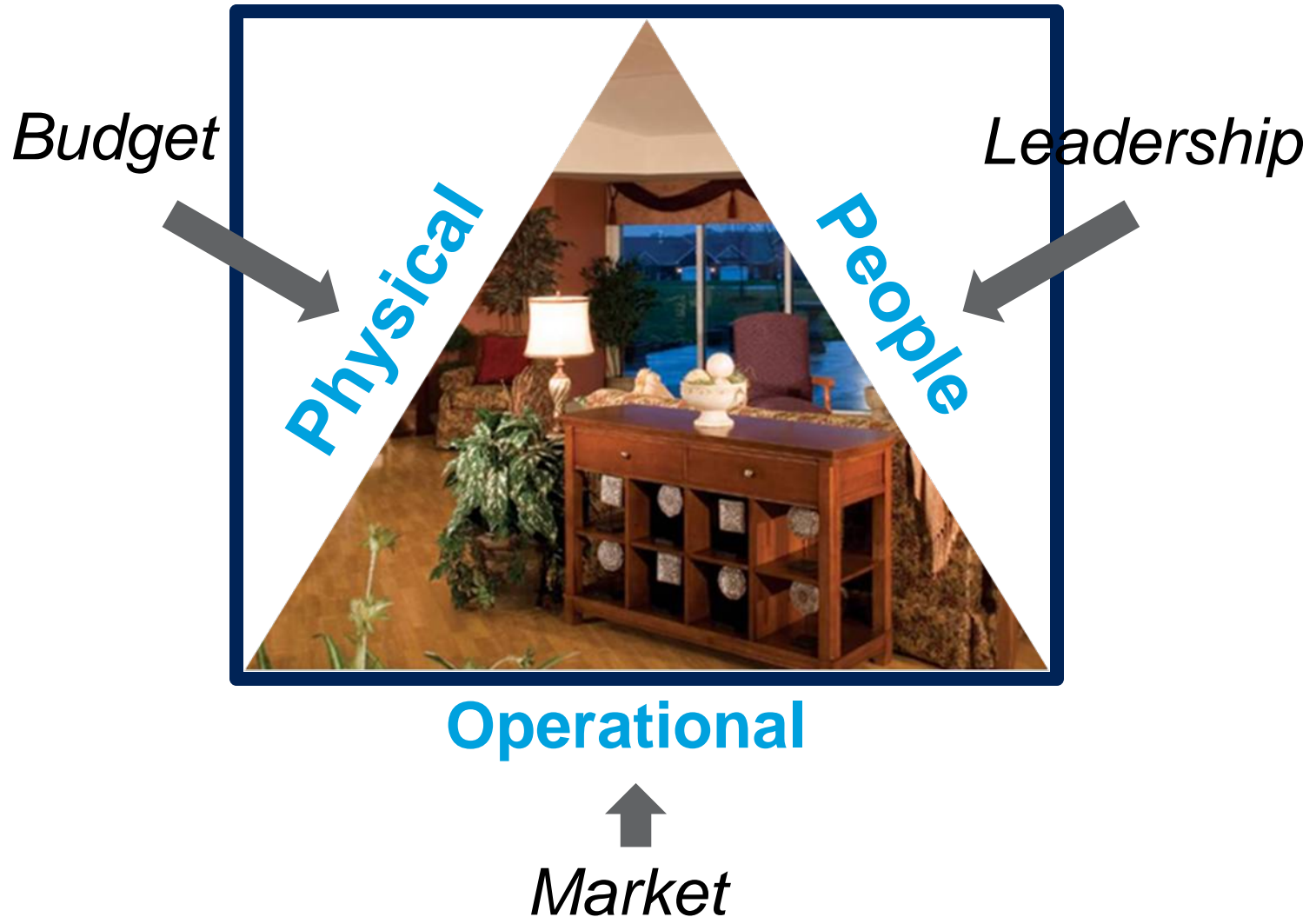
**BARNES & NOBLE**  
BOOKSELLERS



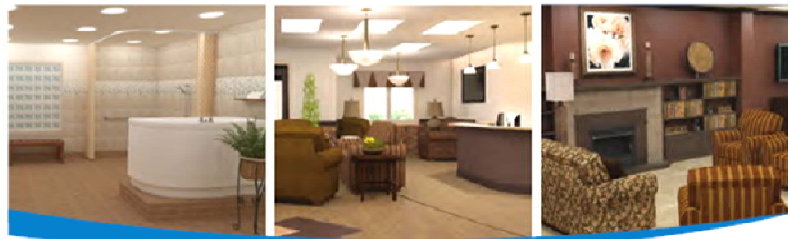
# Conclusions

- Opportunities are ripe but, not everyone will survive
- New model(s) must emerge
- Landscape is unique and getting uniquer
- Leadership opportunities abound!!
- A suggested approach...

# A Model for Change



# POP Model In Action



Transformations begin today

**DIRECT**  
**SUPPLY**  
aptura.

# SunScape Foodservice Approach



# SunScape Foodservice Approach



# So, That Brings Us Back to the Question

*When* are you  
spending your time?

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Thank You for Your Time!

