



U.S. Elder Care Market Summary

Market insights report

Brookdale senior living dominates U.S. Elder care landscape

Driven by an expanding population of citizens over the age of 65 years, the U.S. market for elder care services is expected to top **\$779 billion in 2030***. The rising prevalence of conditions such as dementia, Alzheimer’s, heart disorders, respiratory ailments, and mental disorders is contributing to growth and activity in the long-term care setting over the coming years.

While home healthcare dominates the market in terms of revenue, other care sectors including hospice, assisted living, nursing care, and independent living are fueling the provider expansion.

The data presented in this report are derived from IQVIA’s OneKey provider reference database. IQVIA has identified the key organizations in the industry and ranked them according to the number of facilities they own or operate.

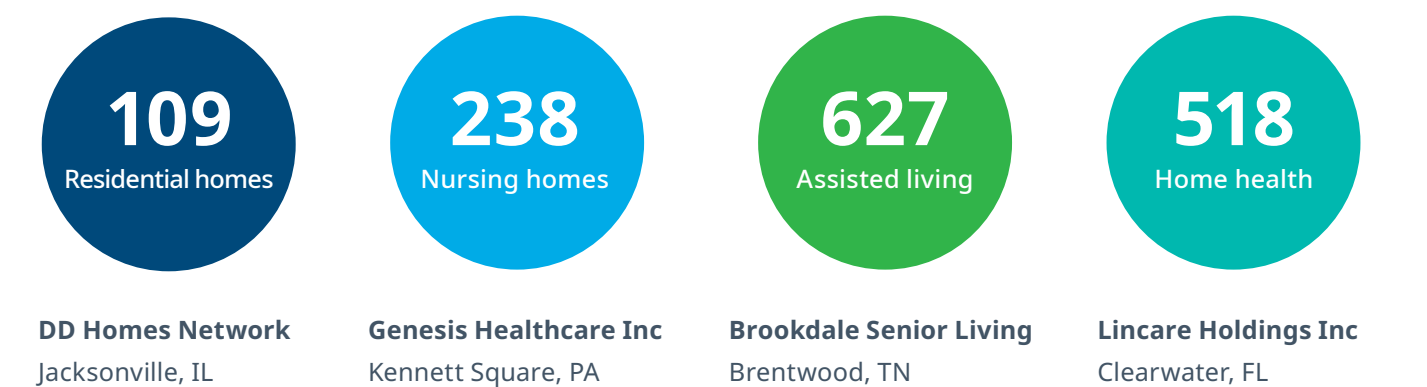
Brookdale Senior Living is a dominant player in the assisted living space and tops our list with 733 sites across five facility types. In all, the 30 largest corporate parents each manage an average of 226 care sites.

These facilities are staffed with nurses, administrators, and other department heads who are documented within OneKey.

The OneKey database is continuously updated and enhanced through a blend of primary research, transactional data, customer change requests, and trusted government and industry sources.

Consultants, analysts, marketers, and commercial team leaders will benefit from this view of the elder care hierarchy. It will help you allocate resources based on the size and locations of the parents, target the group’s leaders and decision makers, and identify affiliated sites and relationships.

U.S. Elder care corporate leaders by facility total



*Grandview Research, San Francisco, CA 2022

U.S. Elder care corporate leaders

RANK	NAME	CITY	STATE	ASSISTED LIVING	HOME HEALTH	INDEPENDENT LIVING	NURSING HOMES	RESIDENTIAL FACILITIES	TOTAL FACILITIES
1	Brookdale Senior Living, Inc	Brentwood	TN	627	35	37	34		733
2	Lincare Holdings, Inc	Clearwater	FL		518				518
3	Amedisys, Inc	Baton rouge	LA		470				470
4	LHC Group, Inc	Lafayette	LA		389				389
5	Davita, Inc	Denver	CO		349				349
6	Humana, Inc	Louisville	KY	2	338				340
7	Genesis Healthcare, Inc	Kennett square	PA	22	1	1	238		262
8	Bayada Home Health Care	Moorestown	NJ		252			6	258
9	National Church Residences	Columbus	OH	11	7	214	3	1	246
10	The Ensign Group, Inc	San juan capistrano	CA	39	11	2	192	2	246
11	Enlivant	Chicago	IL	221					221
12	Brightstar Care	Gurnee	IL		218				218
13	Sunrise Senior Living, Inc	McLean	VA	207		4			211
14	Life Care Centers of America, Inc	Cleveland	TN	3			206		209
15	Elara Caring	Addison	TX		186				186
16	Five Star Senior Living	Newton	MA	129		14	32		175
17	Brightspring Health Services	Louisville	KY		133			29	162
18	Fresenius Medical Care Holdings, Inc	Waltham	MA		157				157
19	Maxim Healthcare Services, Inc	Columbia	MD		156			1	157
20	Trilogy Health Services, LLC	Louisville	KY	20		19	106		145
21	Savaseniorcare Administrative Services, LLC	Atlanta	GA	3			131		134
22	Americare Systems, Inc	Sikeston	MO	102		8	23		133
23	Pruitthealth	Norcross	GA	4	35	1	86	1	127
24	Saber Healthcare Group, Inc	Beachwood	OH	11			110	1	122
25	Option Care Health, Inc	Bannockburn	IL		121				121
26	Aveanna Healthcare, Inc	Atlanta	GA		114				114
27	DD Homes Network	Jacksonville	IL					109	109
28	National Healthcare Corp	Murfreesboro	TN	8	33	1	64	1	107
29	Signature Healthcare, LLC	Louisville	KY	2	2		101	1	106
30	Pacifica senior living	San diego	CA	92		1	4		97

Source: IQVIA's OneKey healthcare provider reference database. **Last update: 6/1/2022.**

OneKey connects your organization to a single reference data standard and helps you understand customer access, value, and potential.

Top 20 U.S. Elder care title counts

RANK	NAME	ASSISTED LIVING	HOME HEALTH	INDEPENDENT LIVING	NURSING HOMES	RESIDENTIAL FACILITIES	TOTAL FACILITIES
1	Head of Administration (Administrator, GM, Other)	11,280	3,207	321	11,268	521	26,597
2	Head of Nursing	1,399	1,060	63	10,643	216	13,381
3	Director of Housekeeping	0	17	110	9,841	177	10,145
4	Medical Director	261	79	14	8,831	39	9,224
5	Director of Activities/Recreation	0	0	104	7,472	76	7,652
6	Director of Food Services	0	0	78	6,783	144	7,005
7	Business Office Director	0	0	121	6,746	206	7,073
8	Director of Social Services	77	18	23	6,200	60	6,378
9	Director of Medical Records	0	0	0	6,058	0	6,058
10	Director of Admissions Services	0	0	0	5,613	94	5,707
11	Pharmacy Consultant	16	3	0	5,559	6	5,584
12	Personnel Director	100	21	16	3,731	75	3,943
13	Head of Finance	0	0	0	2,876	0	2,876
14	Director of Physical Therapy	15	5	81	2,816	41	2,958
15	Receptionist/Secretary	0	0	0	2,712	5	2,717
16	Head of Materials Management	0	0	0	2,083	0	2,083
17	Director of Marketing	853	281	81	1,505	43	2,763
18	Director of Inservice Training/Education	0	0	0	1,484	0	1,484
19	Head of Administration (CEO or President)	655	901	63	1,230	142	2,991
20	Director of Human Resources	0	499	1	740	78	1,318
	Totals	14,656	6,091	1,076	104,191	1,923	127,937

Elder care facilities by state

STATE	ASSISTED LIVING	HOME HEALTH	INDEPENDENT LIVING	NURSING HOMES	RESIDENTIAL FACILITIES	TOTALS
AK	33	48	2	18	11	112
AL	196	598	11	232	26	1,063
AR	81	351	10	228	62	732
AZ	596	519	41	143	94	1,393
CA	1,279	2,358	129	1,192	1,331	6,289
CO	395	475	40	224	45	1,179
CT	116	290	59	209	197	871
DC	8	47	3	19	127	204
DE	26	76	4	48	11	165
FL	1,419	2,683	100	708	282	5,192
GA	399	825	42	371	72	1,709
HI	13	53	5	44	25	140
IA	246	328	27	432	194	1,227
ID	199	200	11	78	69	557
IL	410	1,328	77	734	430	2,979
IN	207	670	74	526	442	1,919
KS	179	322	20	321	68	910
KY	136	384	38	291	71	920
LA	78	727	13	273	529	1,620
MA	251	550	48	386	116	1,351
MD	284	270	34	226	67	881
ME	104	127	7	97	33	368
MI	368	1,106	118	438	55	2,085
MN	453	443	90	364	295	1,645
MO	449	562	60	534	62	1,667
MS	106	460	23	202	34	825
MT	113	111	3	85	6	318
NC	490	847	36	437	413	2,223
ND	59	42	5	86	75	267
NE	180	170	14	208	16	588
NH	86	111	6	77	13	293
NJ	186	482	47	367	68	1,150
NM	114	197	3	68	54	436
NV	83	275	12	60	32	462
NY	393	1,280	109	618	718	3,118
OH	512	1,298	150	957	514	3,431
OK	137	772	19	301	77	1,306
OR	360	207	43	133	40	783
PA	776	1,190	149	701	354	3,170
RI	51	87	3	85	21	247
SC	282	461	18	193	135	1,089
SD	118	63	9	104	12	306
TN	274	723	34	313	144	1,488
TX	762	4,736	114	1,215	973	7,800
UT	132	276	4	93	41	546
VA	376	647	37	285	78	1,423
VT	62	40	6	37	8	153
WA	427	323	40	218	83	1,091
WI	543	361	31	359	44	1,338
WV	82	186	13	121	70	472
WY	32	102	1	37	3	175
Totals	14,661	30,787	1,992	15,496	8,740	71,676

States with most elder care facilities

STATE	ASSISTED LIVING	HOME HEALTH	INDEPENDENT LIVING	NURSING HOMES	RESIDENTIAL FACILITIES	TOTALS
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