

TOP

40

LARGEST ASSISTED LIVING COMPANIES

2014

Steady Stream
Of Variety

MEG LaPORTE

This year's Top 40 Largest Assisted Living Companies represent an occupant capacity of more than 214,000. And this year it's Brentwood, Tenn.-based Brookdale Senior Living taking the top spot with more than 34,513 in occupant capacity. No. 2, Emeritus Senior Living, Seattle, comes in at 31,700.

But the numbers drop precipitously after that, with the No. 3, Atria Senior Living Group, registering a capacity of 17,000—half of Brookdale's count. No. 4 Sunrise Senior Living holds an occupant capacity of 15,220, followed by Five Star Quality Care at just over 14,000. From there the capacities range from 9,000 down to 4,950, at the No. 10 slot.

With the announcement in February that Brookdale and Emeritus will merge, next year's Top 10 assisted living companies will look quite different in terms of capacity. The new Brookdale will become a mammoth provider of assisted living, with an unprecedented capacity that registers north of 64,000, while the remaining nine companies will likely make up a total of approximately 80,000.

DEMENTIA CARE DOMINANT

Dementia care programs continue to dominate the sector, with all 40 of this year's lineup offering this service, just as they did last year. Independent living units are offered by all but three of this year's Top 40, up one count from last year, while just over half of the lineup has nursing home care among its business lines, down two from last year.

Exactly half of the Top 40 providers count outpatient rehabilitation therapy among their

service offerings. Hospice is offered by 19 companies, and dialysis services are provided by seven of this year's assisted living pack leaders.

Bariatric services are offered by 11 of the Top 40 this year, and 14 companies have home care among their business lines.

FUTURE PLANS

Looking ahead, the leading assisted living companies appear to be strategizing for the impending baby boom onslaught with the addition of more spa-like services and amenities. No. 19, Americare, reports that it eliminated nurse stations and med carts "years ago" and also implemented "natural awakening" programs. The company also has adopted a "May I Take Your Order" dining initiative.

No. 28, Benedictine Health System, is constructing a 48-unit "enhanced" assisted living community with a "focus on responding to the preferences and choice of each resident." Also on Benedictine's plate is a collaboration with a major health system in which it is constructing a new post-acute, transitional care facility for short-stay, rehab patients. The facilities are aimed at providing "customized, high-quality, technologically advanced rehabilitation and recovery programs."

Brookdale is adding assisted living and memory care apartments to "select communities," while its ongoing renovations include the addition of units and "décor conducive to the needs of our resident and adult children populations."

Find more details about both the Top 50 and Top 40 providers online at www.provider-magazine.com.

'Top 40 providers continue to bring diversity and dementia care services to residents.'

TOP

40

LARGEST ASSISTED LIVING COMPANIES

Company Name/ Chief Executive Officer	City, State/ Web address	Total Assisted Living Occupant Capacity	Total Facilities With Assisted Living	% Occ. Rate	States With ALFs	Revenue Sources:				Total Assisted Living Revenue	Services Offered:									
						% Medicaid	% Private Pay	% SSI	% Other		Traditional Nursing	Post-acute Care	Dementia Care	Assisted Living	Independent Living	Therapy	Outpatient Therapy	Pharmacy	Home Care	Hospice
1. Brookdale Senior Living T. Andrew Smith	Brentwood, TN www.brookdaleliving.com	34,513	594	90.5	36	0.1	99.9	0	0	\$1.1 Billion	x	x	x	x	x	x	x	x	x	x
2. Emeritus Corp. Granger Cobb	Seattle, WA www.emeritus.com	31,700	N/A	88	45	8.2	91.8	0	0	N/A	x	x	x	x	x	x			x	x
3. Atria Senior Living* John Moore	Louisville, KY www.atriaseniorliving.com	17,000	150	N/A	28	0.2	99.8	0	0	\$857 Million			x	x	x					
4. Sunrise Senior Living* Chris Winkle	McLean, VA www.sunrisesenior living.com	15,220	250	N/A	31	N/A	N/A	N/A	N/A	N/A	x		x	x						
5. Five Star Quality Care Bruce Mackey Jr.	Newton, MA www.fivestarsenior living.com	14,119	220	N/A	31	N/A	N/A	N/A	N/A	N/A	x	x	x	x	x	x	x	x		x
6. Enlivant (formerly Assisted Living Concepts)* Jack Callison	Chicago, IL www.enlivant.com	9,000	200	N/A	18	N/A	N/A	N/A	N/A	N/A		x	x	x	x					
7. Elmcroft Senior Living* Pat Mulloy	Louisville, KY www.elmcroft.com	7,151	82	81.6	19	6	94	0	0	\$241.3 Million	x		x	x	x	x	x			
8. Capital Senior Living Corp. Lawrence Cohen	Dallas, TX www.capitalsenior.com	7,016	83	N/A	23	N/A	N/A	N/A	N/A	N/A	x	x	x	x	x	x	x	x	x	x
9. LCS* Edward Kenny	Des Moines, IA www.lcsnet.com	5,159	99	90	28	N/A	N/A	N/A	N/A	N/A	x	x	x	x	x	x	x		x	
10. HCR ManorCare* Paul Ormond	Toledo, OH www.hcr-manorcare.com	4,950	65	N/A	13	N/A	N/A	N/A	N/A	N/A	x	x	x	x	x	x	x	x	x	x
11. Integral Senior Living* Collette Valentine	Carlsbad, CA www.isllc.com	4,261	41	86.7	8	2	96	0	2	\$116.4 Million			x	x	x					
12. Genesis HealthCare* George Hager Jr.	Kennett Square, PA www.genesisihcc.com	4,132	65	N/A	21	N/A	N/A	N/A	N/A	N/A	x	x	x	x	x	x	x		x	x
13. Leisure Care* Dan Madsen	Seattle, WA www.leisurecare.com	4,068	29	90.8	9	0	100	0	0	N/A			x	x	x					
14. Merrill Gardens* Tana Gall	Seattle, WA www.merrillgardens.com	4,000	26	94	4	0	100	0	0	\$210.2 Million			x	x	x					

Ranked by number of beds as of Dec. 31, 2011. U.S. operations only. Percentages may not add up to 100% due to rounding.

TOP

40

LARGEST ASSISTED LIVING COMPANIES

N/A Not Available *Private †Nonprofit #2012 Data
All companies are for profit and publicly traded unless otherwise noted.

Company Name/ Chief Executive Officer	City, State/ Web address	Total Assisted Living Occupant Capacity	Total Facilities With Assisted Living	% Occ. Rate	States With ALFs	Revenue Sources:				Total Assisted Living Revenue	Services Offered:									
						% Medicaid	% Private Pay	% SSI	% Other		Traditional Nursing	Post-acute Care	Dementia Care	Assisted Living	Independent Living	Therapy	Outpatient Therapy	Pharmacy	Home Care	Hospice
15. Benchmark Senior Living* Thomas Grape	Wellesley, MA www.benchmarkseniorliving.com	3,848	49	92	6	0	95	5	0	\$302.1 Million	x		x	x	x					
16. BMA Management* Rod Burkett	Bradley, IL www.bma-mgmt.com	3,593	37	92.3	1	67	33	0	0	\$132.2 Million			x	x	x					
17. Frontier Management* Gregory Roderick	Portland, OR www.frontiermgmt.com	3,539	46	N/A	9	N/A	N/A	N/A	N/A	N/A			x	x	x					
18. Belmont Village Senior Living*# Patricia Will	Houston, TX www.belmontvillage.com	3,455	21	92	7	0	100	0	0	N/A			x	x	x					
19. Americare* Clay Crosson	Sikeston, MO www.americareusa.net	3,250	103	80	5	5	65	30	0	\$101 Million	x	x	x	x	x	x	x	x		
20. Prestige Care * David Henderson	Vancouver, WA www.prestigecare.com	3,059	52	87	7	14	86	0	0	\$106 Million	x	x	x	x	x	x	x	x	x	x
21. Trilogy Health Services* Randall Bufford	Louisville, KY www.trilogys.com	2,775	63	87	4	2	98	0	0	\$94.7 Million	x	x	x	x	x	x	x	x		
22. JEA Senior Living*# Jerry Erwin	Vancouver, WA www.jeaseniorliving.com	2,474	37	N/A	13	10	90	0	0	N/A			x	x						
23. Evangelical Lutheran Good Samaritan Society*† David Horazdovsky	Sioux Falls, SD www.good-sam.com	2,304	88	87	19	23	77	0	0	\$67.1 Million	x	x	x	x	x	x	x	x	x	x
24. Chelsea Senior Living* Roger Bernier	Fanwood, NJ www.chelseaseniorliving.com	1,999	17	92	3	18	82	0	0	\$95.5 Million			x	x	x					
25. Aegis Living Dwayne Clark	Redmond, WA www.aegisliving.com	1,977	28	N/A	3	N/A	N/A	N/A	N/A	\$127 Million			x	x						
26. The Arbor Co.* Judd Harper	Atlanta, GA www.arborcompany.com	1,922	18	94	9	0	100	0	0	N/A			x	x	x					
27. Harbor Retirement Associates Timothy Smick	Vero Beach, FL www.hraseniorliving.com	1,850	20	82	82	4	0.1	99.9	0	0 Million	\$55.6			x	x	x	x			
28. Benedictine Health System*† Rocklon Chapin	Duluth, MN www.bhshealth.org	1,613	32	82.7	82.7	5	10.8	89.2	0	0 Million	\$36.7	x	x	x	x	x	x	x		x

TOP
40

LARGEST ASSISTED LIVING COMPANIES

N/A Not Available *Private †Nonprofit #2012 Data
All companies are for profit and publicly traded unless otherwise noted.

Company Name/ Chief Executive Officer	City, State/ Web address	Total Assisted Living Occupant Capacity	Total Facilities With Assisted Living	% Occ. Rate	States With ALFs	Revenue Sources:				Total Assisted Living Revenue	Services Offered:									
						% Medicaid	% Private Pay	% SSI	% Other		Traditional Nursing	Post-acute Care	Dementia Care	Assisted Living	Independent Living	Therapy	Outpatient Therapy	Pharmacy	Home Care	Hospice
29. The Ensign Group Christopher Christensen	Mission Viejo, CA www.ensigngroup.net	1,603	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	x	x	x	x	x	x	x		x	x
30. HHHunt Senior Living* Jim King	Blacksburg, VA www.hhhunt.com	1,556	21	92	2	12	88	0	0	\$62 Million			x	x		x				
31. Saber Healthcare Group* George Repchick	Bedford Heights, OH www.saberhealth.com	1,362	19	N/A	5	10	90	0	0	N/A	x	x	x	x	x	x	x	x	x	x
32. Petersen Health Care* Mark Petersen	Peoria, IL www.petersenhealthcare.net	1,323	22	88	2	25	70	5	0	\$85 Million	x	x	x	x	x	x	x	x	x	x
33. Commonwealth Assisted Living* Richard Brewer	Charlottesville, VA www.commonwealthal.com	1,218	19	N/A	3	0	100	0	0	N/A			x	x						
34. Skilled Healthcare Group Robert Fish	Foothill Ranch, CA www.skilledhealthcare group.com	1,212	22	N/A	2	N/A	N/A	N/A	N/A	N/A	x	x	x	x	x	x	x	x	x	x
35. American Senior* Communities James Burkhart	Indianapolis, IN www.ascseniorcare.com	1,190	12	91	1	5	95	0	0	\$31 Million	x	x	x	x	x	x	x		x	x
36. Juniper Communities* Lynne Katzmann	Bloomfield, NJ www.junipercommunities. com	1,096	15	95	4	5	95	0	0	\$62 Million			x	x	x					
37. Milestone Retirement Communities* Paul Dendy	Vancouver, WA www.milestoneretirement. com	1,064	15	90.6	9	12.6	87.4	0	0	\$28 Million			x	x	x	x				x
38. Independent Healthcare Properties* Greg Vital	Georgetown, TN www.morningpointe.com	1,060	20	86	5	0	100	0	0	N/A			x	x						
39. Ridgeline Management* Charles McGlade	Eugene, OR www.ridgelinemc.com	1,044	17	91	10	23	76	0	1	\$33 Million			x	x	x					
40. Eskaton*† Todd Murch	Carmichael, CA www.eskaton.org	713	9	85	1	0	100	0	0	\$37.2 Million	x	x	x	x	x	x	x		x	



It's never too early to start planning for
National Assisted Living Week!

The specialty items for this event will sell out, so order your t-shirts, posters, buttons, balloons and other items today. The early bird shopper always gets the best deals. Order products at www.NCALpublications.org. Event details can be found at www.NALW.org.