

TOP

40

LARGEST ASSISTED LIVING COMPANIES

2013

Dementia Care
Universal In
Assisted Living

MEG LaPORTE

Emeritus Senior Living edged out Brookdale Senior Living this year for the top spot, both companies having jostled for No. 1 over the past few years. Emeritus, however, made a leap of more than 20,000 in its occupant capacity in the past year, likely due to its fourth quarter 2012 lease and ownership acquisition of 138 communities.

The remaining top contenders shuffled a bit, except for Sunrise Senior Living, Atria Senior Living, and Five Star Quality Care, which remained in slots Nos. 3, 4, and 5, respectively, again this year. No. 6 this year is Merrill Gardens, which switched places with Assisted Living Concepts, which comes in at No. 7.

Elmcroft Senior Living took over slot No. 8, with a capacity of 7,268, while Capital Senior Living landed at No. 9, just ahead of Leisure Care, which fell one space to No. 10.

Newcomers to the Top 40 this year include BMA Management, Bradley, Ill.; Milestone Retirement Communities, Vancouver, Wash.; and Saber Healthcare Group, Foothill Ranch, Calif.

PERSON-CENTERED CARE CONTINUES

A number of assisted living providers are taking on person-centered care models of care, including top dog Emeritus. The company says it is redesigning its memory care neighborhoods “to address stages of memory loss, incorporating new technology for resident socialization and family communication, including wireless technology, for operations and nursing.”

Americare, No. 17, reported that it is “very active in many aspects of the Pioneer Network.”

No. 2, Brookdale, is making ongoing renova-

tions by adding units and revamping “physical plants and décor conducive to the needs of our resident and adult children populations.”

Similarly, No. 18, Trilogy Health Services, says it will remove nurse stations from all facilities, and “we continually strive to make our facilities feel more homelike.”

No. 21, Aegis Living, is “reviewing and updating our activities program and Life Skills Stations to increase benefit to residents and families.”

DIVERSIFICATION ON THE RISE

Unsurprisingly, all of this year’s Top 40 providers offer dementia care among their services. What’s more, there are 36 that have independent living in their lineup of service/housing types, a jump of three from last year’s 33.

Also similar to last year among the Top 40 providers, 23 this year also offer nursing home care, compared with 24 companies that had traditional nursing home care in their business lines.

Last year’s Top 40 included 22 companies that offered post-acute care, compared with this year’s figure of 21.

Outpatient therapy is offered by 16 companies in this year’s Top 40, mostly by companies that have post-acute care services and/or buildings as well.

This year’s lineup represents a resident capacity of more than 240,000 and more than 2,900 buildings.

Provider’s 2013 Top 40 Largest Assisted Living Companies is ranked by occupant capacity as of Dec. 31, 2012.

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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. Emeritus Senior Living Granger Cobb	Seattle, WA www.emeritus.com	50,000	483	86.8	45	8	92	0	0	\$1.35 Billion	x	x	x	x	x	x			x	
2. Brookdale Senior Living Andrew Smith	Brentwood, TN www.brookdaleliving.com	33,435	591	89.7	36	2	98	0	0	\$1 Billion	x	x	x	x	x	x	x	x	x	x
3. Sunrise Senior Living*# Mark Ordan	McLean, VA www.sunrisesenior living.com	27,098	269	N/A	31	N/A	N/A	N/A	N/A	N/A	x	x	x	x	x	x				x
4. Atria Senior Living* John Moore	Louisville, KY www.atriaseniorliving.com	14,800	N/A	N/A	27	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	14,309	202	86.6	25	N/A	N/A	N/A	N/A	N/A	x	x	x	x	x	x	x			
6. Merrill Gardens* Bill Pettit	Seattle, WA www.merrillgardens.com	11,085	61	94	9	0	100	0	0	\$240 Million			x	x	x					
7. Assisted Living Concepts Charles Roadman III, MD	Menomonee Falls, WI www.alcco.com	9,348	211	N/A	20	0	100	0	0	\$228.4 Million			x	x	x					
8. Elmcroft Senior Living* Pat Mulloy	Louisville, KY www.elmcroft.com	7,268	86	89.1	19	4	96	0	0	\$250 Million			x	x	x					
9. Capital Senior Living Corp. Lawrence Cohen	Dallas, TX www.capitalsenior.com	5,750	70	N/A	23	N/A	N/A	N/A	N/A	\$310.5 Million	x	x	x	x	x	x	x	x	x	x
10. Leisure Care* Dan Madsen	Seattle, WA www.leisurecare.com	5,074	31	93	9	0	100	0	0	N/A			x	x	x					
11. HCR ManorCare* Paul Ormond	Toledo, OH www.hcr-manorcare.com	4,940	65	N/A	13	N/A	N/A	N/A	N/A	N/A	x	x	x	x	x	x	x	x	x	x
12. Genesis HealthCare* George Hager Jr.	Kennett Square, PA www.genesisihcc.com	4,478	47	N/A	22	N/A	N/A	N/A	N/A	N/A	x	x	x	x	x	x	x		x	x
13. LCS* Edward Kenny	Des Moines, IA www.lcsnet.com	4,318	82	90	26	N/A	N/A	N/A	N/A	N/A	x	x	x	x	x	x	x		x	
14. Benchmark Senior Living* Thomas Grape	Wellesley, MA www.benchmarksenior living.com	4,214	45	92	6	0	97	0	3	\$307.8 Million	x		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.

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15. 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					
16. BMA Management* Rod Burkett	Bradley, IL www.bma-mgmt.com	3,359	36	94	1	56	44	0	0	\$102 Million			x	x	x					
17. Americare* Clay Crosson	Sikeston, MO www.americareusa.net	2,945	102	85	5	10	75	15	0	\$71 Million	x	x	x	x	x	x	x	x		
18. Trilogy Health Services* Randall Bufford	Louisville, KY www.trilogyhs.com	2,477	56	81.8	5	2	98	0	0	\$78 Million	x	x	x	x	x	x	x	x	x	x
19. JEA Senior Living* Jerry Erwin	Vancouver, WA www.jeaseniorliving.com	2,474	37	N/A	13	10	90	0	0	N/A			x	x						
20. Frontier Management* Gregory Roderick	Durham, OR www.frontiermgmt.com	2,392	39	N/A	8	N/A	N/A	N/A	N/A	N/A	x		x	x	x	x				
21. Aegis Living Dwayne Clark	Redmond, WA www.aegisliving.com	2,302	28	N/A	3	0	100	0	0	N/A			x	x						
22. Evangelical Lutheran Good Samaritan Society*† David Horazdovsky	Sioux Falls, SD www.good-sam.com	2,256	89	86	18	24	76	0	0	\$64.6 Million	x	x	x	x	x	x	x	x	x	x
23. Integral Senior Living* Sue Farrow	Carlsbad, CA www.islllc.com	2,255	41	89.7	9	1	99	0	0	\$95.2 Million			x	x	x					
24. Prestige Care* Harold Delamarter	Vancouver, WA www.prestigecare.com	2,096	35	88	7	12	88	0	1	\$81 Million	x	x	x	x	x	x	x	x	x	x
25. Chelsea Senior Living* Herbert Heflich	Fanwood, NJ www.chelseasenior living.com	1,803	15	93	3	17	83	0	0	\$78.6 Million			x	x	x					
26. The Ensign Group Christopher Christensen	Mission Viejo, CA www.ensigngroup.net	1,799	12	78.9	8	N/A	N/A	N/A	N/A	N/A	x	x	x	x	x	x	x		x	x
27. The Arbor Co.* Ellison Thomas	Atlanta, GA www.arborcompany.com	1,722	19	91	7	0	100	0	0	N/A			x	x	x					
28. HHHunt Senior Living* Jim King	Blacksburg, VA www.hhhunt.com	1,556	21	92	2	12	88	0	0	\$62 Million			x	x		x				

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29. Benectine Health System* Dale Thompson	Duluth, MN www.bhshealth.org	1,453	22	83.3	6	13	87	0	0	\$35.1 Million	x	x	x	x	x	x	x		x	x
30. Petersen Health Care* Mark Petersen	Peoria, IL www.petersenhealthcare.net	1,225	22	88	2	25	70	5	0	\$85 Million	x	x	x	x	x	x	x	x	x	x
31. Commonwealth Assisted Living* Richard Brewer	Charlottesville, VA www.commonwealthal.com	1,218	19	N/A	3	0	100	0	0	N/A			x	x						
32. Juniper Communities* Lynne Katzmann	Bloomfield, NJ www.junipercommunities.com	1,203	15	95	4	5	95	0	0	\$56 Million	x	x	x	x	x	x				
33. Milestone Retirement Communities* Paul Dendy	Vancouver, WA www.milestoneretirement.com	1,064	15	90.6	9	13	87	0	0	\$28 Million			x	x	x	x				x
34. Independent Healthcare Properties* Greg Vital	Georgetown, TN www.morningpointe.com	1,060	20	86	5	0	100	0	0	N/A			x	x						
35. Ridgeline Management* Charles McGlade	Eugene, OR www.ridgelinemc.com	1,044	17	91	10	23	76	0	1	\$33 Million			x	x	x					
36. Saber Healthcare Group* George Repchick	Bedford Heights, OH www.saberhealth.com	1,025	13	73.2	5	N/A	N/A	N/A	N/A	\$25 Million	x	x	x	x	x	x	x			x
37. Skilled Healthcare Group Boyd Hendrickson	Foothill Ranch, CA www.skilledhealthcare.com	926	22	80.9	3	12	86	1	1	\$28 Million	x	x	x	x	x	x	x		x	x
38. National HealthCare Corp. Robert Adams	Murfreesboro, TN www.nhccare.com	847	17	85.9	11	N/A	N/A	N/A	N/A	N/A	x	x	x	x	x	x		x	x	x
39. 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	
40. American Senior Communities* James Burkhart	Indianapolis, IN www.americansrcommunities.com	705	9	92	1	5	95	N/A	N/A	\$19.5 Million	x	x	x	x	x	x				x

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