

Quick Pass on Nursing Home Data

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1 “Enrollment” Data

Availability Monthly between September 2022 - April 2023 ([link](#))

Purpose This provides us with these “affiliation entities” which are larger corporations that seem to own multiple nursing homes. In October 2022, this includes:

- Genesis Healthcare (237 nursing homes; 22 states)
- The Ensign Group (236 nursing homes; 14 states)
- Life Care Centers of America (208 nursing homes; 29 states)

And the largest ratios:

- Creative Solutions in Healthcare (82 nursing homes; 1 state)
- American Senior Communities (75 nursing homes; 1 state)
- Regency Integrated Health Services (56 nursing homes; 1 state)

Merge In order to try and backfill these affiliation entities, we merge at the **Enrollment ID** level with the set of changes in ownership between January 1st, 2016 and October 2022 (**Change of Ownership Data**).

2 “Change of Ownership” Data

Availability Contains SNF ownership changes that occurred on or after January 1, 2016 ([link](#))

Purpose As of October 2022, there were **3,491** changes in ownership logged. Large affiliation entities accounted for **2,841** (81.4%) of these purchases. The largest purchases include

- The Ensign Group (78 nursing homes; 9 states)
- Creative Solutions in Healthcare (55 nursing homes; 1 state)
- North Shore Healthcare (51 nursing homes; 3 states)

And the acquirers which acquired the most nursing homes per state include:

- Creative Solutions in Healthcare (55 nursing homes; 1 state)
- HMG Healthcare (30 nursing homes; 1 state)
- Senior Living Properties (28 nursing homes; 1 state)

3 Results by State

3.1 Unweighted

Unweighted Counts in October 2022:

- There were **14,843** nursing homes, of which **9,785 (65.9%)** were owned by these large affiliations
- A back-of-the-envelope calculation suggests that since **2,841 nursing homes** were acquired by these groups, we would have a **23%** increase in nursing home ownership by these affiliations.
- Large states that are highly chain-owned include
 - Indiana (516 nursing homes; 83.1% chain-owned)
 - Texas (1,186 nursing homes; 77.1% chain-owned)
 - Tennessee (306 nursing homes; 74.2% chain-owned)
- Large states that are not highly chain-owned include:
 - New York (618 nursing homes; 46.3% chain-owned)
 - Wisconsin (337 nursing homes; 51.0% chain-owned)
 - Minnesota (347 nursing homes; 51.9% chain-owned)

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Table 1: Changes in Concentration for the Largest Owners by State

Large Affiliation Entities	State	Share Owned in 2016	Share Owned in 2022	ΔShare
Genesis Healthcare	New Mexico	31.8%	36.3%	4.5%
Genesis Healthcare	New Hampshire	25.7%	30.0%	4.3%
Genesis Healthcare	West Virginia	28.1%	28.1%	0.0%
Cascadia Healthcare	Idaho	15.2%	27.8%	12.6%
Genesis Healthcare	Vermont	11.1%	25.0%	13.9%
The Ensign Group	Arizona	16.9%	23.2%	6.3%
The Ensign Group	Utah	5.3%	20.2%	14.9%
Empres Healthcare Group	Wyoming	12.5%	18.8%	6.3%
Legacy Healthcare	South Dakota	0.0%	17.8%	17.8%
American Medical Facilities Management	West Virginia	16.7%	16.7%	0.0%

3.2 Weighted

Weighted Counts in October 2022:

- There were **1,105,326** patient days, of which **753,125 patient days (68.1%)** were in facilities that were owned by these large organizations

Table 2: Changes in Weighted Concentration for the Largest Owners by State

Large Affiliation Entities	State	Share Owned in 2016	Share Owned in 2022	ΔWeighted Share
Genesis Healthcare	New Mexico	36.7%	41.9%	5.2%
The Ensign Group	Arizona	23.7%	32.3%	6.6%
Genesis Healthcare	West Virginia	30.9%	30.9%	0.0%
Cascadia Healthcare	Idaho	19.1%	30.7%	11.6%
Genesis Healthcare	New Hampshire	23.5%	27.9%	4.4%
The Ensign Group	Utah	7.9%	25.6%	17.7%
Empres Healthcare Group	Wyoming	14.0%	22.4%	8.4%
Avalon Healthcare	Utah	7.5%	21.3%	13.8%
Avamere	Oregon	20.2%	20.2%	0.0%
West Virginia	Vermont	18.4%	18.4%	0.0%