

## **United States Senior Living - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 120 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

The United States Senior Living Market size is estimated at USD 119.55 billion in 2025, and is expected to reach USD 158.93 billion by 2030, at a CAGR of 5.86% during the forecast period (2025-2030).

#### **Key Highlights**

- In 2024 and beyond, senior living communities are expected to shift their emphasis from caregiving to wellness, a trend that is expected to continue. Wellness-focused communities offer residents access to fitness facilities, nutrition programs, mental health services, and various social activities. This holistic approach to senior living is expected to enhance senior adults' overall quality of life.
- The U.S. population is projected to age faster than any other age group in the country over the next decade as baby boomers age beyond retirement. In the U.S., over 10,000 people reach the age of 65 every day.
- In particular, the population of people over 80 in the United States is projected to increase by almost 50% over the next ten years, rising from 13.9 million to 20.8 million. This highlights the huge demand for additional senior housing and nursing care. By comparison, the overall population growth in the United States is projected to be a modest 4.7% over the same period.
- Assisted living and independent living properties both experienced significant growth in occupancy rates, accounting for more than 80% and 70%, respectively. In addition, the market experienced the highest occupancy rates in San Jose (83.7%), Portland (83.4%), San Francisco (83.4%), etc. Also, low occupancy rates were noted in Houston (73.0%), Atlanta (74.8%), Las Vegas (74.9%), etc.
- Most of the senior housing communities are present in the Southeast region of the United States, with 3,706 communities, followed by West (3,436), Northeast (3,320), North Central (3,303), and South Central (2,244). The Southeast region includes North Carolina, South Carolina, Tennessee, Georgia, Florida, Alabama, Mississippi, Arkansas, Louisiana, and Texas.
- The Northeast region includes Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut, New York, New

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Jersey, and Pennsylvania. The West region comprises Montana, Idaho, Wyoming, Colorado, New Mexico, Arizona, Utah, Nevada, California, Oregon, Washington, Alaska, and Hawaii.

## United States Senior Living Market Trends

### Senior Housing Witnessing Increased Demand

- According to data from the National Investment Centre for Older Persons, occupancy rates are at an all-time high in the elderly housing and care sector. With an occupancy rate of 82.1% as of August 2023, assisted living had the highest quarterly increase in all categories of care. The occupancy rate is 85.2% in the area of senior living, which covers both assisted and independently lived accommodation and memory care.
- There are approximately 32,820 assisted living communities in the United States, according to the most recent data from the National Center for Assisted Living. Almost 1.28 million assisted living beds are registered with the National Centre for Active Living. As the population of people over 65 is expected to almost double by 2060, care facilities are also expected to grow similarly.
- Most assisted living communities (over 80%) are for-profit, but according to the National Center for Assisted Living (NCAL), nonprofit communities continue to outpace their national-brand counterparts. Nonprofit communities tend to be smaller, with higher occupancy rates but potentially fewer amenities. According to NCAL, the living sector employed nearly 480,500 full-time employees as of January 2023.
- All staff, such as managers, sales representatives, care assistants, cooks, janitors, and maintenance workers, are included. Approximately 300 million of the 480 million workers are full-time healthcare and social services employees.

### Nursing Care Communities Experiencing Significant Growth

- The demand for nursing care is increasing significantly due to the increase in the baby boomer generation, born before World War 2, in the United States. This aging population requires higher health support and more senior living communities. Furthermore, the nursing community sector is driven by severe health conditions of senior citizens, such as chronic heart diseases, Alzheimer's and dementia, arthritis, and high blood pressure, which need to be monitored by skilled nursing staff.
- In addition, they provide typical services, including nursing care, 24-hour supervision, three meals a day, and assistance with everyday activities. These centers offer physical, occupational, speech therapy, and other rehabilitation services. On the other hand, the prices of the beds increased by 22%, with expenses averaging USD 3,320 per bed for nursing care.
- In addition, a significant number of service units or beds are contributed to nursing care, amounting to more than 46%, which accounts for approximately 43,725 beds with skilled nursing staff. In addition, they provide typical services, including nursing care, 24-hour supervision, three meals a day, and assistance with everyday activities. These centers offer physical, occupational, speech therapy, and other rehabilitation services.
- On the other hand, the prices of the beds increased by 22%, with expenses averaging USD 3,320 per bed for nursing care. In addition, a significant number of service units or beds are contributed to nursing care, amounting to more than 46%, which accounts for approximately 43,725 beds with skilled nursing staff.

## United States Senior Living Industry Overview

The senior living market in the United States is fragmented. Furthermore, the market is majorly dominated by local and small

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

developers. Higher competition exists among the fragmented players.

In addition, players are expanding their businesses through mergers, acquisitions, strategic partnerships, and new project launches to meet customer needs. Some of the major players in the market include Brookdale Senior Living Inc., Five Star Senior Living, Sunrise Senior Living, Holiday Retirement, and LCS.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

## **Table of Contents:**

### 1 INTRODUCTION

#### 1.1 Study Deliverables

#### 1.2 Scope of the Study

### 2 RESEARCH METHODOLOGY

### 3 EXECUTIVE SUMMARY

### 4 MARKET INSIGHTS AND DYNAMICS

#### 4.1 Market Overview

#### 4.2 Market Dynamics

##### 4.2.1 Market Drivers

###### 4.2.1.1 Increase in Aging Population Driving the Market

###### 4.2.1.2 Healthcare and Long-term Care Needs Driving the Market

##### 4.2.2 Market Restraints

###### 4.2.2.1 High Affordability and Cost of Care Affecting the Market

###### 4.2.2.2 Staffing and Workforce Challenges Affecting the Market

##### 4.2.3 Market Opportunities

###### 4.2.3.1 Technological Innovations Driving the Market

#### 4.3 Insights into Technological Innovation in the Senior Living Sector

#### 4.4 Government Regulations and Initiatives

#### 4.5 Supply Chain/Value Chain Analysis

#### 4.6 Industry Attractiveness - Porter's Five Forces Analysis

##### 4.6.1 Threat of New Entrants

##### 4.6.2 Bargaining Power of Buyers/Consumers

##### 4.6.3 Bargaining Power of Suppliers

##### 4.6.4 Threat of Substitute Products

##### 4.6.5 Intensity of Competitive Rivalry

#### 4.7 Impact of COVID-19 on the Market

### 5 MARKET SEGMENTATION

#### 5.1 By Property Type

##### 5.1.1 Assisted Living

##### 5.1.2 Independent Living

##### 5.1.3 Memory Care

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- 5.1.4 Nursing Care
- 5.1.5 Other Property Types
- 5.2 By Key States
  - 5.2.1 New York
  - 5.2.2 Illinois
  - 5.2.3 California
  - 5.2.4 North Carolina
  - 5.2.5 Washington
  - 5.2.6 Rest of United States

## 6 COMPETITIVE LANDSCAPE

- 6.1 Overview (Market Concentration and Major Players)
- 6.2 Company Profiles
  - 6.2.1 Brookdale Senior Living Inc.
  - 6.2.2 Five Star Senior Living
  - 6.2.3 Sunrise Senior Living
  - 6.2.4 Holiday Retirement
  - 6.2.5 Kisco Senior Living Company
  - 6.2.6 LCS
  - 6.2.7 Erickson Senior Living
  - 6.2.8 Atria Senior Living Inc.
  - 6.2.9 Senior Lifestyle
  - 6.2.10 Sonida Senior Living
  - 6.2.11 Ventas
  - 6.2.12 Watermark Retirement Communities
  - 6.2.13 Ensign Group Inc.\*
- 6.3 Other Companies

## 7 FUTURE OF THE MARKET

## 8 APPENDIX

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## United States Senior Living - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

### ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	2025-05-08
		Signature	

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)  
[www.scotts-international.com](http://www.scotts-international.com)