

PACE

PROGRAMS OF ALL-INCLUSIVE CARE FOR THE ELDERLY

MARKET SNAPSHOT REPORT 2019



SECTOR SIZE



126

ORGANIZATIONS
IN 31 STATES



3.8K

(49,000) PARTICIPANTS



13%

LOWER COST FOR STATES THAN
OTHER MEDICAID SERVICES

RELATIVE TO OTHER LTSS SECTORS, PACE IS

#8

Smallest
in terms of
service providers

ASSISTED LIVING
NURSING HOME
HOME HEALTH
SENIOR CENTER
ADULT DAY
HOSPICE
LIFE PLAN COMMUNITY
PACE

#8

Smallest
in terms of
people served

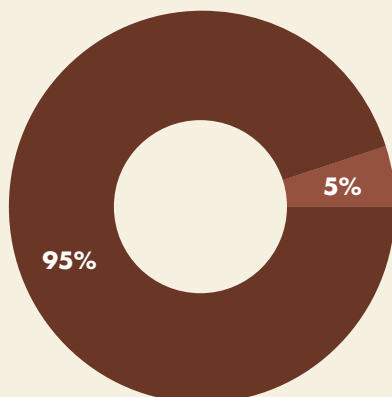
SENIOR CENTER
HOME HEALTH
NURSING HOME
HOSPICE
ASSISTED LIVING
LIFE PLAN COMMUNITY
ADULT DAY
PACE

#8

Smallest
in terms of
revenue

NURSING HOME
ASSISTED LIVING
LIFE PLAN COMMUNITY
HOME HEALTH
HOSPICE
ADULT DAY
SENIOR CENTER
PACE

SECTOR COMPOSITION



- Nonprofit (122 PACE programs)
- For-profit (4 PACE programs)

A TYPICAL PACE PROGRAM

- > **260 pace centers and 126 sponsoring organizations**, in **31** states. PACE enrollees are less likely to suffer depression. **97.5%** of family caregivers recommend PACE.
- > **PACE enrollees average less than 1 ER visit per year.** The average enrollee: **90%** are dually eligible for Medicaid and Medicare, **95%** living in the community.
- > In the average month, a participant take: **8** visits to PACE center, **4** trips to outpatient therapy centers, take **9** prescriptions.
- > PACE serves **18,506 meals a day.**

FAST FACTS

- PACE programs operate in **31** U.S. states.
- Qualifying citizens must be at least **55 years** and be judged to need nursing home level of care.
- **9 in 10** participants are also dual-eligible for both Medicare and Medicaid.
- Average age is **76**, have **5.8** chronic conditions, and **35%** of them need assistance with 5-6 ADLs.
- **7 in 10** participants are women.
- Nearly half of PACE programs — **42%** — are sponsored by hospitals or hospital partners.

SECTOR TRENDS



PACE programs have been **expanding rapidly** nationwide.

- > 47 programs in 2007 vs. 126 today.
- > Another **20 in development**.



12%/yr



Existing PACE programs are also growing in **scope**.

- > 57% are planning to expand.



For-profit ownership within PACE is emerging, as HHS and CMS recently enabled for-profits to launch PACE programs on a pilot basis.



Possible trends: reduced hospital admissions, decreased rehospitalizations, reduced ER visits.

The mission of **LeadingAge** is to be the trusted voice for aging. Our **6,000+ members** and partners include nonprofit organizations representing the entire field of aging services, 38 state associations, businesses, consumer groups, foundations and research centers.



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