

State of Ohio Hospice Care Report

Program Integrity & Market Analysis — May 2026

About the data

184

Total licensed Ohio hospices (ODH, May 2026)

160

Medicare-certified hospices with claims data (Oct 2024–Sep 2025)

93,152

Medicare patients served by Ohio hospices in 2025

Sources: (1) ODH Facility Listing, May 2026. (2) Health Pivots/Netsmart Medicare Claims, Oct 2024–Sep 2025.

Growth & market entry

+26

New hospices since 2021 (158 to 184)

28%

Of all Ohio hospices opened in the last 5 years

6

Hospices opened in the last 12 months alone

Medicare-certified hospice count by year:



¹ 2021–2025: Medicare-certified hospices only (Health Pivots/Netsmart). These years are directly comparable.

² 2026: All ODH-licensed hospices. Medicare-certified count is approximately 168 — still a 6.3% increase since 2021. The ~16 state-licensed but not yet Medicare-certified providers are themselves an oversight concern.

Red flag: rapid provider growth

A 16.5% increase in hospice providers in 5 years — concentrated in urban markets — strains oversight capacity. Rapid market entry is a nationally recognized indicator of potential fraud, waste, and abuse in the hospice benefit.

Source: ODH Facility Listing (May 2026); Health Pivots Benchmarking Reports (2021–2025)

Ownership & control

For-profit vs. not-for-profit (Medicare-certified):

■ For-profit 54% ■ Not-for-profit 36% ■ Unknown 11%



54% of Ohio's Medicare-certified hospices are for-profit entities

16 hospices are state-licensed but lack Medicare certification — outside federal quality oversight

🚩 Out-of-state ownership

Multiple Ohio hospices are owned by entities based in TN, UT, CA, NJ, IL, and NC — raising local accountability concerns.

Source: Health Pivots Ranking Report 2025; ODH Facility Listing May 2026

Medicare cap utilization

67.9%

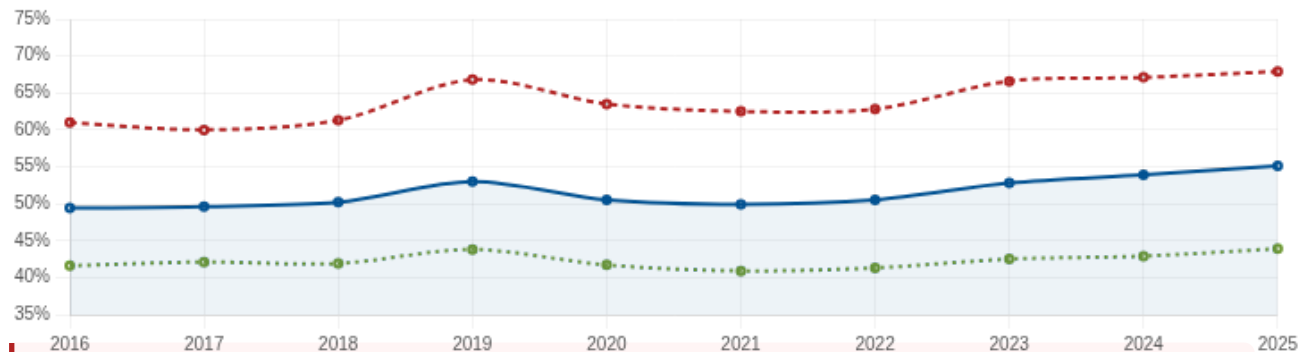
For-profit cap utilization (2025)

43.9%

Not-for-profit cap utilization (2025)

Cap utilization trend — all Ohio hospices:

■ All Ohio ■ For-profit ■ Not-for-profit



🚩 For-profits bill 24 percentage points higher than not-for-profits

This persistent gap is a documented program integrity indicator nationally. Higher cap utilization correlates with longer lengths of stay and aggressive enrollment practices that may prioritize billing over appropriate care.

Source: Health Pivots Benchmarking Report, Cap Utilization Trend (Oct 2024–Sep 2025)

Program integrity — live discharge rates

35%

of Ohio hospices exceeded the 25% red flag threshold

15.4%

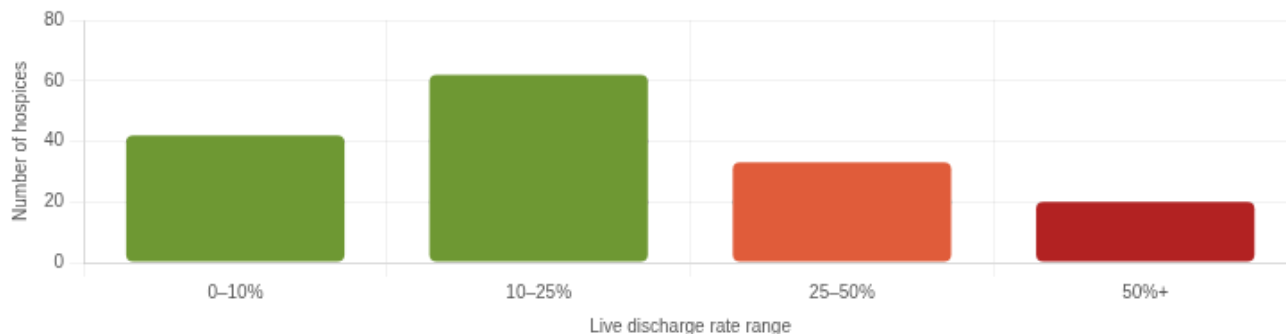
Ohio statewide average live discharge rate

94.6%

Highest reported live discharge rate among Ohio hospices

Number of Ohio hospices by live discharge rate range:

■ Below threshold (0–25%) ■ Elevated (25–50%) ■ High concern (50%+)



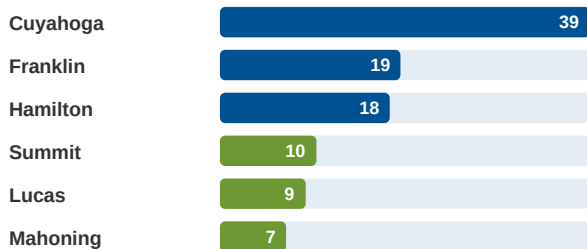
What live discharge rates tell us

A live discharge occurs when a patient leaves hospice care while still living. Rates significantly above average can indicate patients were enrolled without meeting terminal eligibility criteria. The nationally recognized red flag threshold is 25%. While Ohio's statewide average remains below the national benchmark of 19.1%, the proportion of providers exceeding that threshold warrants closer oversight attention.

Source: Health Pivots/Netsmart Medicare Claims (Oct 2024–Sep 2025). Individual provider data: medicare.gov/care-compare.

Geographic concentration & age of hospices

Hospices by county (top 6):

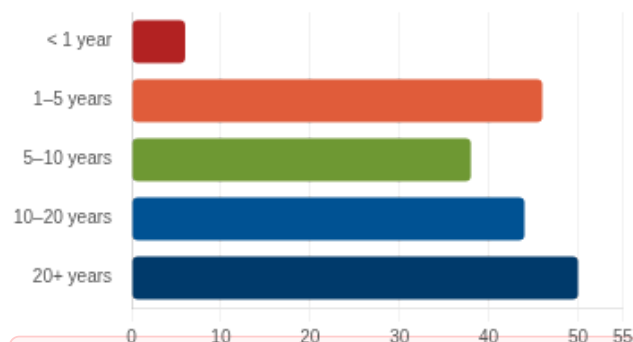


Cuyahoga County: 1 in 5 Ohio hospices in a single county

39 hospices — 21% of all Ohio hospices — operate in Cuyahoga County alone. 14 of those 39 opened since 2021, a 56% increase in just 5 years.

Age of Ohio hospices (184 total):

■ <1 yr ■ 1–5 yrs ■ 5–10 yrs ■ 10–20 yrs ■ 20+ yrs



1 in 4 Ohio hospices opened in the last 5 years

52 of 184 hospices (28%) have operated 5 years or less — straining oversight capacity and increasing program integrity risk.

Source: ODH Facility Listing (May 2026); Health Pivots/Netsmart (Oct 2024–Sep 2025)

Growth is bypassing rural Ohio

92%

Of new hospices since 2021 opened in metro areas

4

New hospices opened in rural/non-metro counties since 2021

79%

Of all Ohio hospices are in metro counties

Where are new hospices opening? (2021–2026)

Metro counties

48 of 52

Rural counties

4

The 4 rural new entrants since 2021: Legacy Hospice (Allen Co.), Cherish Hospice (Clark Co.), Cawley Hospice (Washington Co.), and True Blue Hospice (Auglaize Co.).

38

hospices serve all of Ohio's rural counties combined — a number barely changed while metro markets have exploded

Market-driven growth fails rural Ohioans

Unregulated market entry concentrates hospice growth where profit margins are highest — not where access gaps exist. Rural Ohioans face the same shortage they always have while regulators struggle to oversee dozens of new competitors in already-saturated metros.

Source: ODH Facility Listing (May 2026); county metro/rural classification based on Ohio MSA designations.

Is provider growth improving access?

+7.5%

Growth in Medicare patients served,
2021–2025 (85,785 to 92,242)

+13.3%

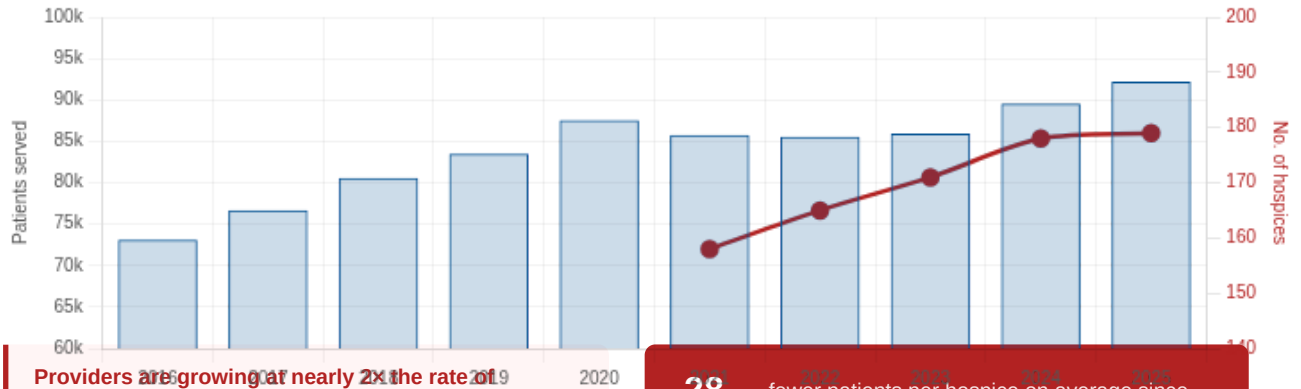
Growth in hospice providers over the
same period (158 to 179)

-5%

Decline in average patients per hospice
— from 543 (2021) to 515 (2025)

Ohio Medicare patients served vs. number of hospice providers:

■ Patients served (left axis) ■ No. of hospices (right axis, 2021–2025)



Providers are growing at nearly 2x the rate of patients

From 2021 to 2025, the number of Medicare patients served grew 7.5% — but the number of hospice providers grew 13.3%. The average number of patients per hospice fell from 543 to 515. New hospices are dividing a modestly growing patient pool into more pieces, not expanding access to a new population.

-28

fewer patients per hospice on average since 2021 — the clearest sign that Ohio has more hospices than the market needs

Source: Health Pivots/Netsmart State Profile — Ohio, Medicare Claims through Dec 2025; Health Pivots Benchmarking Reports (2021–2025).

Ohio vs. national benchmarks

87.6%

Ohio hospice penetration rate (2025) —
% of Medicare decedents who used
hospice

81.5%

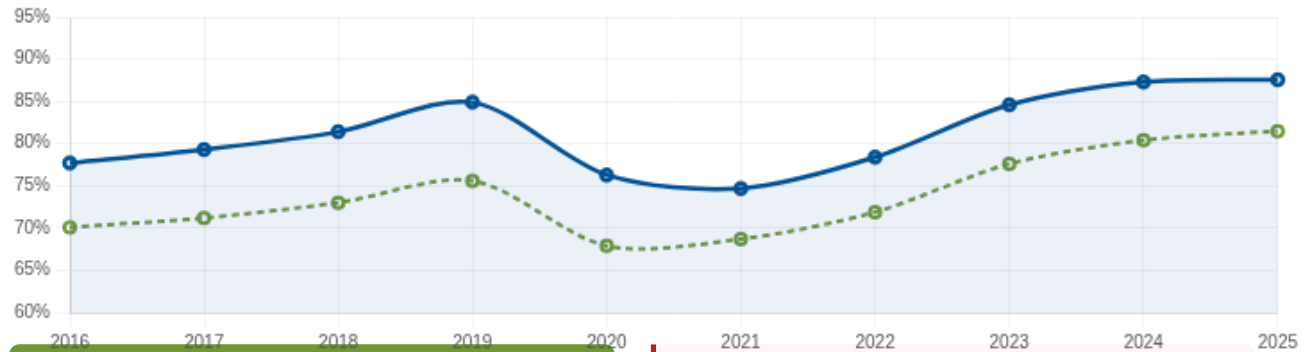
National hospice penetration rate (2025)
— Ohio is 6 points above average

74.9

Ohio average days per patient (2025) —
exactly matches the national average

Hospice penetration rate — Ohio vs. national (% of Medicare decedents served):

■ Ohio ■ National



+6pt Ohio's hospice penetration has exceeded the national average every year since 2016 — and the gap is widening. Ohio is not an access-deficit state.

⚠ More hospices have not driven Ohio's access advantage

Ohio's penetration rate was already well above the national average before the recent provider surge. The growth in hospice numbers since 2021 does not explain Ohio's access lead — it reflects market saturation in metros, not a response to unmet need.

Source: Health Pivots/Netsmart State Profile — Ohio & National, Medicare Claims through Dec 2025.

The bottom line

Ohio already leads the nation in hospice access, yet rapid for-profit market entry continues to concentrate new providers in already-saturated metro markets while rural counties remain underserved. Rising Medicare cap utilization, alarming live discharge rates, and unchecked out-of-state ownership collectively point to a program integrity environment that warrants immediate legislative attention. Strengthening oversight, transparency, and enrollment accountability will safeguard Ohio's most vulnerable patients — urban and rural alike — and protect the integrity of the Medicare hospice benefit.