

# 2026 National Snapshot

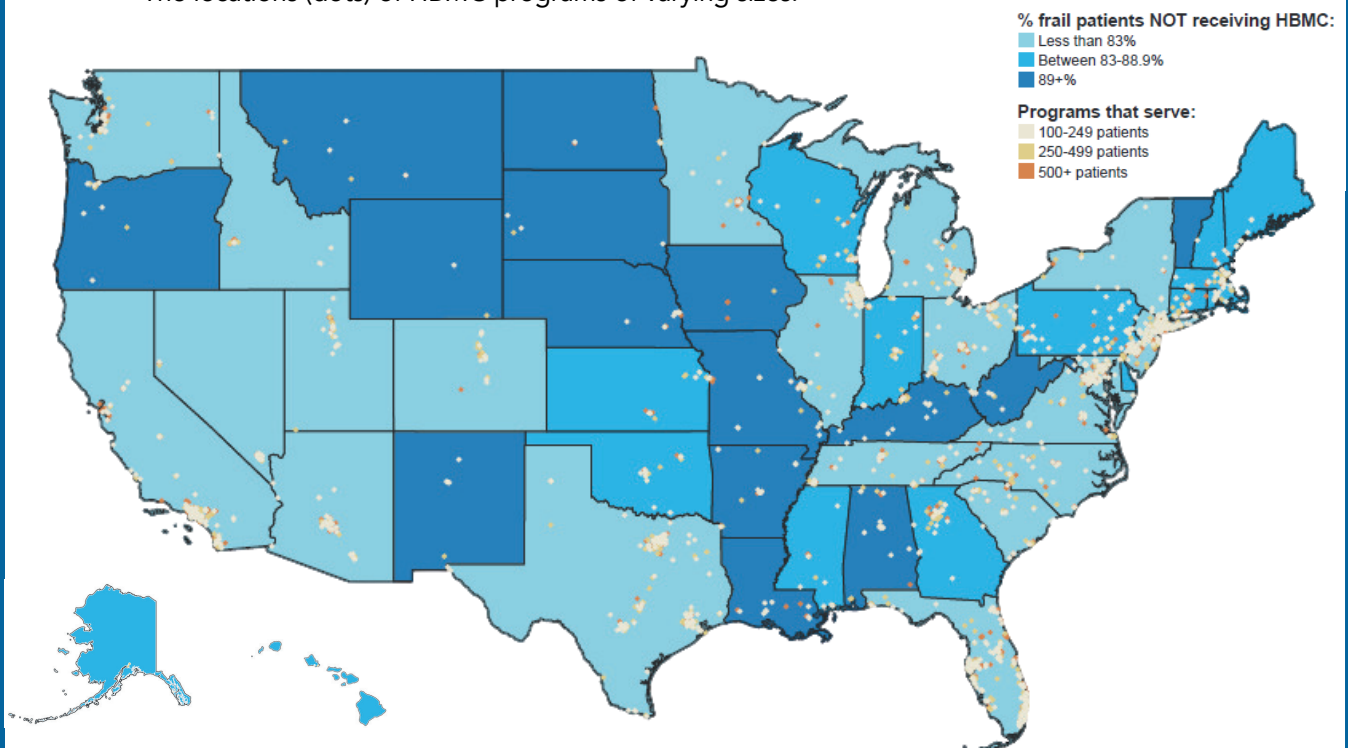
State of Unmet Need for Home-Based Medical Care\* in U.S.  
Data Source: 2025 Traditional Medicare Claims, Centers for Medicare & Medicaid Services

- More than 7 million Americans who are either homebound or challenged to leave home need Home-Based Medical Care (HBMC).\*
- Over 5.9 million of these people cannot access HBMC primarily due to a workforce shortage and the need for payment reform - so that payments reflect the value of services provided.
- At least 12,000 providers are needed to meet the need. Today, there are only 4,500.
- One provider offering HBMC full-time can generally manage a caseload of 200 patients.

## Demand vs. Supply: U.S. Map of Unmet HBMC Needs and Provider Base

The map below, using data from Centers for Medicare & Medicaid Services accessed through HCCI's Confer Analytics<sup>®</sup> platform, illustrates:

- Areas (shaded) where HBMC needs of frail† older adults are NOT being met.
- The locations (dots) of HBMC programs of varying sizes.



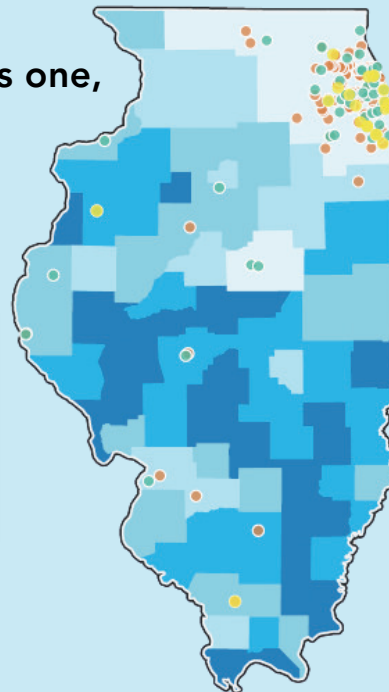
\* The terms "Home-Based Medical Care (HBMC)" and "Home-Based Primary Care," often used interchangeably, represent a model that combines home-based care for medical needs with intense management, care coordination, as well as long-term services and supports (LTSS) when needed. HBMC interventions have been proposed as an alternative way of organizing and delivering care that may better address the needs, values, and preferences of chronically ill, frail, and disabled patients who have difficulty accessing traditional office-based care, primary care, or newer models of care that also require office visits. Source: [www.effectivehealthcare.ahrq.gov](http://www.effectivehealthcare.ahrq.gov) Published online: November 19, 2014

† Frailty is theoretically defined as a clinically recognizable state of increased vulnerability resulting from aging-associated decline in reserve and function across multiple physiologic systems such that the ability to cope with every day or acute stressors is comprised. (Fried LP, Tangen CM, Walston J, et al. Frailty in older adults: evidence for a phenotype. *J Gerontol A Biol Sci Med Sci.* 2001;56(3):M146-M156. [PubMed] [Google Scholar] [Ref list])

## KEY TAKEAWAYS

- In 40 states, more than 81% of frail patients in need of HBMC are not receiving it.
- In states such as Florida, Michigan, and New Jersey, where there are more HBMC programs, a higher percentage (~20%) of frail patients have received HBMC.
- States like West Virginia, South Dakota, Iowa, and New Mexico can be considered HBMC 'deserts,' with over 90% of frail patients not receiving the care they need.
- HBMC programs are often concentrated in large metropolitan areas (e.g., Tampa, Chicago, New York), leaving frail patients in rural counties with significant challenges accessing care.

To see the full interactive U.S. map, including state or county maps like this one, visit [bit.ly/2026-Snapshot](https://bit.ly/2026-Snapshot) or scan the QR code.



These interactive maps are best viewed through a desktop.

<https://www.hccinstitute.org/confer-analytics/>