

The 8th Annual Edition of the
HOME CARE TM
BENCHMARKING
STUDY  **2017**

For the Private Duty Home Care Industry

SnapShot Report

Purchase the complete “2017 Home Care Benchmarking Study”
at benchmarking.homecarepulse.com.

The home care industry's most comprehensive national study—featuring insights and benchmarks on caregiver recruitment & retention, sales & marketing, finance, operations, and much more.

Conducted by:

HOME CARE PULSE[®]
Empowering Excellence  in Home Care

Endorsed by:

 **Home Care**
Association of America

To purchase the complete "2017 Home Care Benchmarking Study"
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Highlighted pages below are included in this SnapShot Report.

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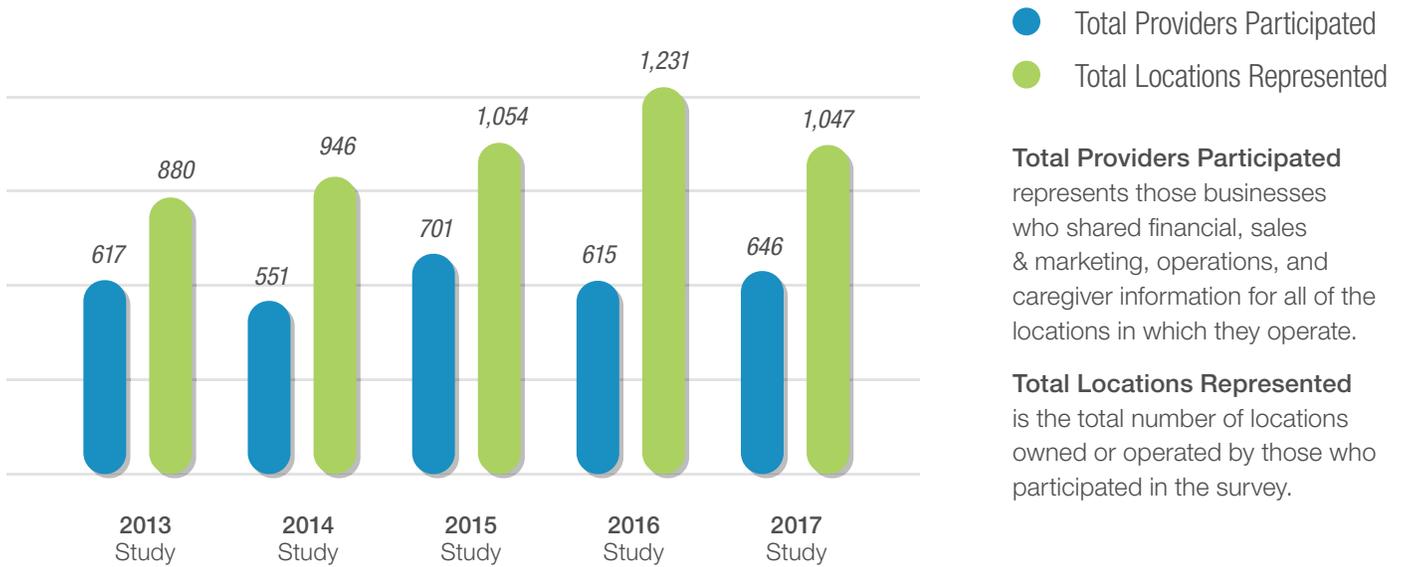
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Overall Participation Summary

1.1 Historical Total Participation

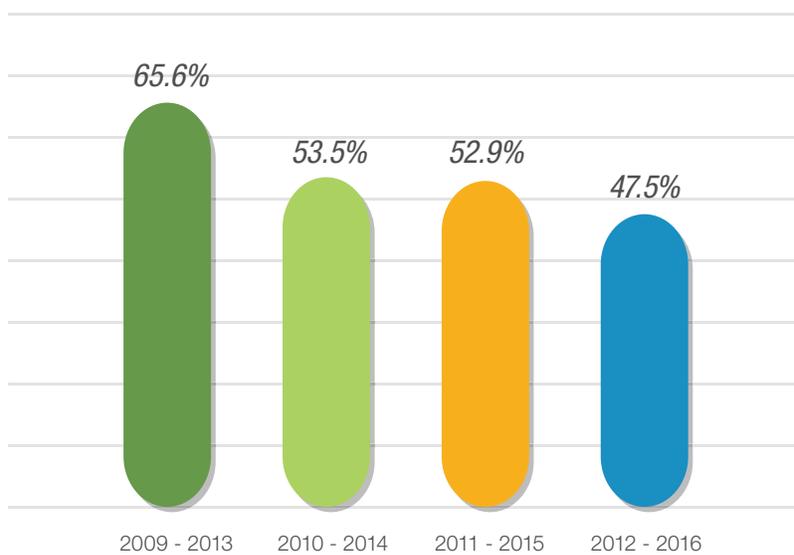


- Total Providers Participated
- Total Locations Represented

Total Providers Participated represents those businesses who shared financial, sales & marketing, operations, and caregiver information for all of the locations in which they operate.

Total Locations Represented is the total number of locations owned or operated by those who participated in the survey.

1.2 Historical Total Growth - 5 Year Range



This graph shows the previous five-year historical industry growth for 2012, 2013, 2014, 2015 and 2016. Based upon the number of new providers who started business over the last five years, our survey shows the industry has grown 47.5% over the last 5 years.

Leader in Excellence Award Winners



Best of Home Care® Leader in Excellence

The title of Leader in Excellence is awarded to the few home care businesses that set the highest standard for quality in home care, receiving the highest client and caregiver satisfaction scores in at least 15 of the 20 categories measured by Home Care Pulse through monthly client and caregiver interviews. This award shows current and prospective clients that these providers are dedicated to client satisfaction and excellence in home care.

Special Note: The following includes all winners as of March 2017. The 2017 Best of Home Care Award is based on 2016 performance.

UNITED STATES



ARIZONA

- ABRiO Care – Yuma
- BrightStar Care – Tucson –
Sierra Vista
- Catalina In-Home Services – Tucson
- Home Assist Health



ARKANSAS

- Right at Home – Central Arkansas



CALIFORNIA

- BrightStar Care –
Central Western Riverside CTY
- Comfort Keepers of Yolo,
Sacramento, and Solano Counties
- Home Helpers – San Mateo
- HomeLife Senior Care

- Right at Home –
Central Orange County
- Right at Home – Fresno
- Right at Home of the Desert



COLORADO

- Home Care Assistance – Centennial,
- Visiting Angels – Grand Junction



FLORIDA

- Assisting Hands Home Care –
Naples
- BrightStar Care –
Jupiter/Martin County
- BrightStar Care –
Kissimmee/Osceola
- BrightStar Care – Port Charlotte
- BrightStar Care – Venice
- BrightStar Care – Wellington



GEORGIA

- A Helping Hand Home Care –
Gainesville
- BrightStar Care – St. Simons Island
- CarePlus Inc.
- Visiting Angels – Fayetteville



ILLINOIS

- BrightStar Care –
Tinley Park/Oak Lawn
- Comfort Keepers – Rockford
- Home Helpers – Dupage Suburbs
- Norwood Seniors Network
- Right at Home –
Northern Lake County
- Right at Home –
Northwest Suburban
- Right at Home – Orland Park
- SYNERGY HomeCare – Schaumburg
- Visiting Angels – Rockford
- Visiting Angels – South Elgin



INDIANA

Comfort Keepers – LaPorte
 Senior Helpers – Greenwood
 Visiting Angels – Fort Wayne



MARYLAND

Shepherd’s Staff In-home Care –
 Walkersville



MASSACHUSETTS

Visiting Angels – Newburyport
 Visiting Angels – Newton/Canton



MICHIGAN

Visiting Angels – Great Lakes Bay
 Visiting Angels – Sterling Heights



MINNESOTA

Homewatch CareGivers – Edina



MISSOURI

Right at Home – St. Charles



NEVADA

Eden Home Care



NEW HAMPSHIRE

Visiting Angels – Auburn
 Visiting Angels – Nashua
 Visiting Angels – Stratham



NEW JERSEY

Comfort Keepers – Haddonfield
 Comfort Keepers- Morristown
 Homewatch CareGivers –
 South Orange



NEW YORK

FirstLight HomeCare of Westchester



NORTH CAROLINA

BrightStar Care –
 Brunswick/New Hanover
 BrightStar Care – Gastonia
 Visiting Angels – Charlotte



OHIO

Assisting Hands Home Care –
 Cincinnati
 Cherished Companions
 Home Care, LLC
 Home Care Assistance – Cincinnati
 Visiting Angels – Canton



OKLAHOMA

Asbury Inverness at Home



OREGON

Hearts of Gold Caregivers
 Visiting Angels – Willamette Valley



PENNSYLVANIA

Comfort Keepers – Springfield and
 King of Prussia
 Comfort Keepers – Williamsport
 Seniors Helping Seniors –
 Bucks County
 SYNERGY Home Care – Carlisle
 Visiting Angels – Lewisburg



SOUTH CAROLINA

BrightStar Care – Rock Hill
Comfort Keepers of Greenville
and Spartanburg



SOUTH DAKOTA

Right at Home –
Southeast South Dakota



TEXAS

BrightStar Care – Laredo
BrightStar Care – Rio Grande Valley
Homewatch CareGivers – El Paso
Nurses Unlimited – Midland
Right at Home – Dallas
Right at Home – Galveston



UTAH

Right at Home – Salt Lake City



WASHINGTON

Angel Senior Care
Sound Options Inc
Visiting Angels – Kirkland
Visiting Angels – Port Orchard

Using Our Awards:

“For potential referral sources, trying to decide between equally qualified and vetted in-home care agencies, it’s been advantageous to be able to differentiate our agency by our association with an independent, third party organization in Home Care Pulse. It not only proves that we can provide the services their clients need; it also shows that we care about the quality of the services we provide and the manner in which we provide those services.”

Mark Wang

Visiting Angels – Willamette Valley, OR

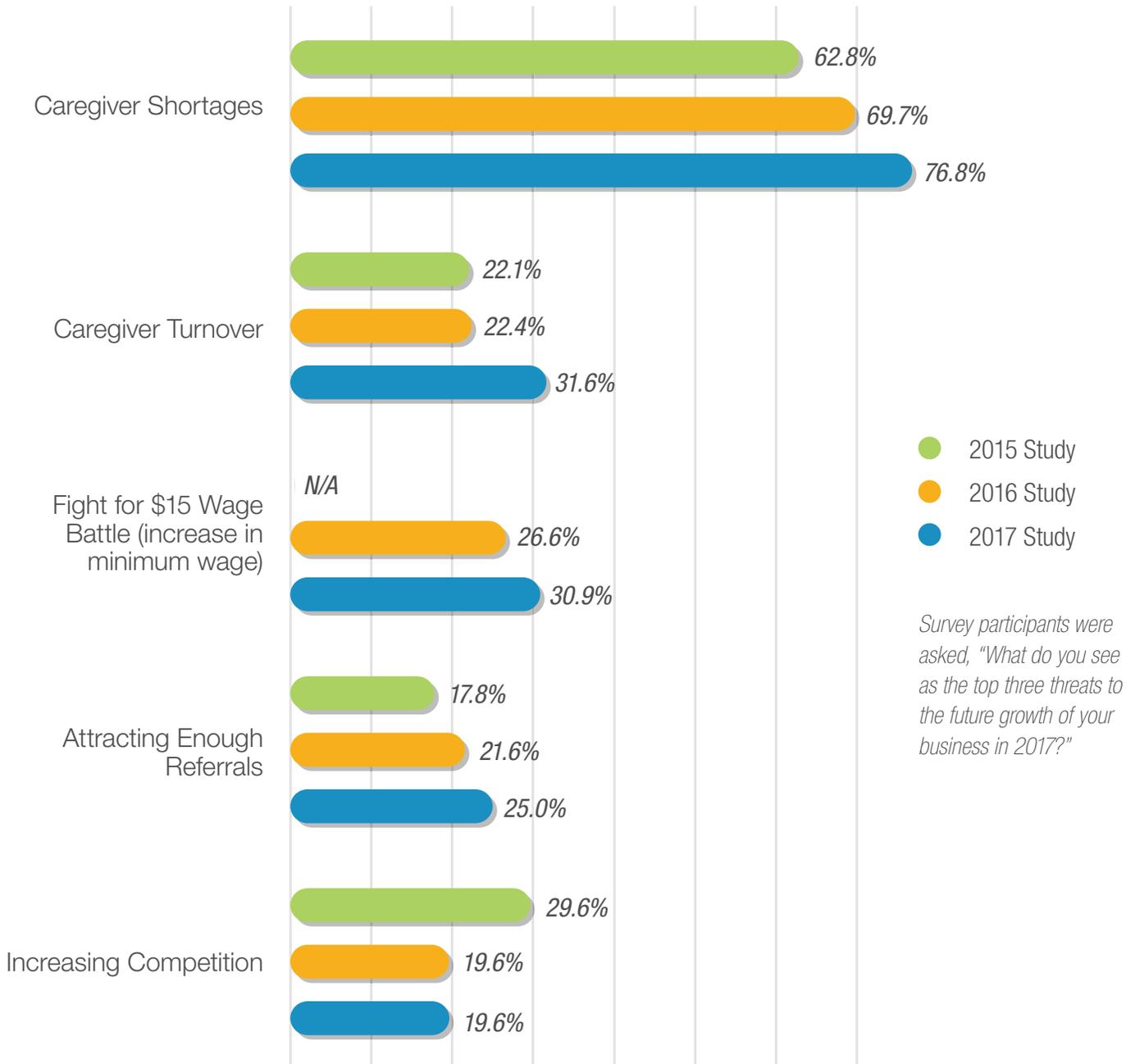
“We have been a Home Care Pulse client since June of 2013, we wish we had joined sooner. The insight the Home Care Pulse program has given us has been instrumental in helping us recognize potential problems in the field and correct them before they became a problem. It is by reading the Home Care Pulse reports every month and responding quickly to any concerns that we have been able to earn the Leader in Excellence Award.”

Debbie Harrison

Visiting Angels - Grand Junction, CO

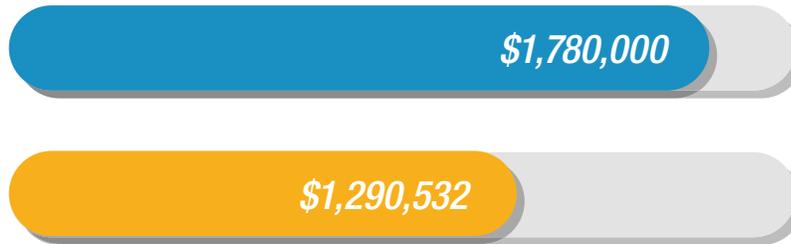
Threats Facing Providers

3.13 Top 5 Threats Facing Home Care Providers - Historical



Inquiry Tracking Comparison

3.21 Inquiry Tracking Comparison - Median Revenue for 2016



- Track Every Inquiry
- Do Not Track Every Inquiry

This graph shows the median revenue for those providers who track every inquiry about services versus those providers who do not track every inquiry about services.

3.22 Inquiry to Admission Ratio Comparison - Median Revenue for 2016



- 45%+ Ratio
- Less than 45% Ratio

Displayed is the median revenue of those providers whose inquiry to admission ratio is 45% or greater, compared to those whose inquiry to admission ratio is less than 45%.



Download the Inquiry Tracking Tool

Visit the www.homecarepulse.com resource library to download our free Inquiry Tracking tool.

Top Reasons Caregivers Work for a Provider

4.6 Top 5 Reasons Caregivers Chose to Work for a Provider in 2016

Rank	Top Reasons Caregivers Choose to Work for a Provider
1	First Job Applied For/ First Company to Offer Employment
2	Company was Recommended to Them
3	Good Working Environment and Benefits
4	Company has Good Reputation
5	Working Schedule Met Lifestyle

Each month, Home Care Pulse conducts thousands of interviews with caregivers as part of our Satisfaction Management Program. The following is one of the questions asked: “Why did you choose to work for this agency over others?” The top five reasons are shown above.

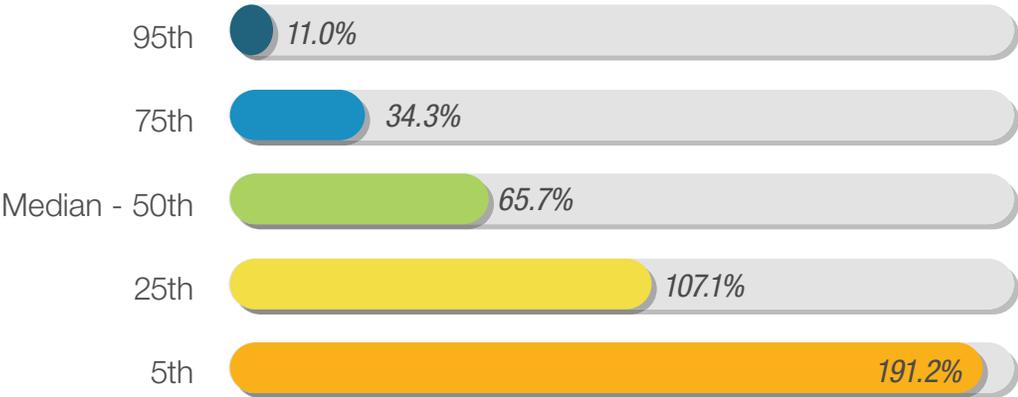
If you would like to learn more about the reasons why your caregivers chose to work for your home care agency as well as their level of satisfaction, please contact Home Care Pulse at homecarepulse.com or at (877) 307-8573. We'd love to talk with you about our powerful Satisfaction Management Program and the tools we have available to assist with your recruitment and retention needs.

For more information on Home Care Pulse Satisfaction Management Program, visit homecarepulse.com.



Caregiver Turnover Rates

4.15 Caregiver Turnover Rate for 2016 - Percentile Ranking

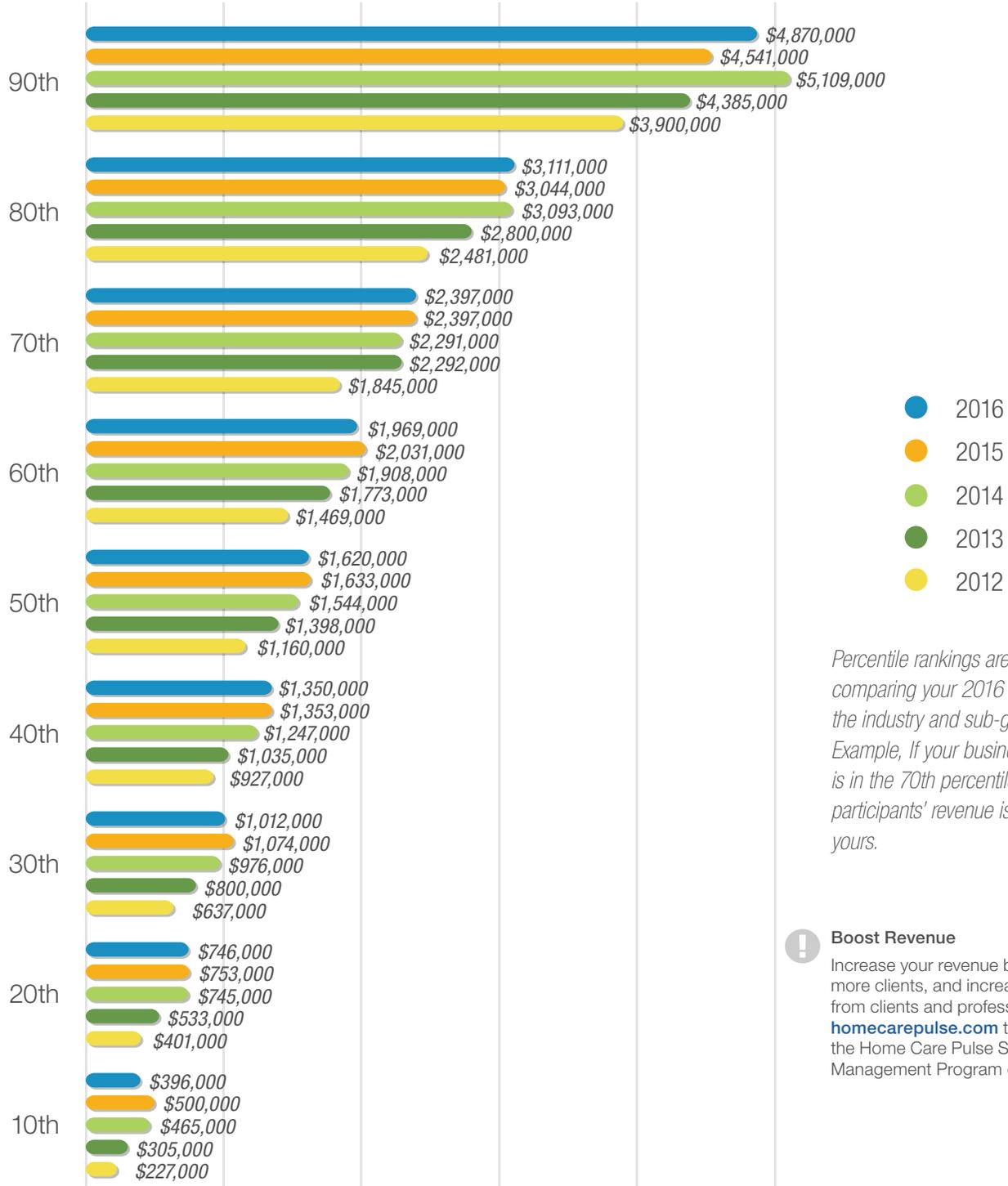


Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.



Revenue Percentile Rankings

5.1 Historical Revenue Percentile Rankings - Overall



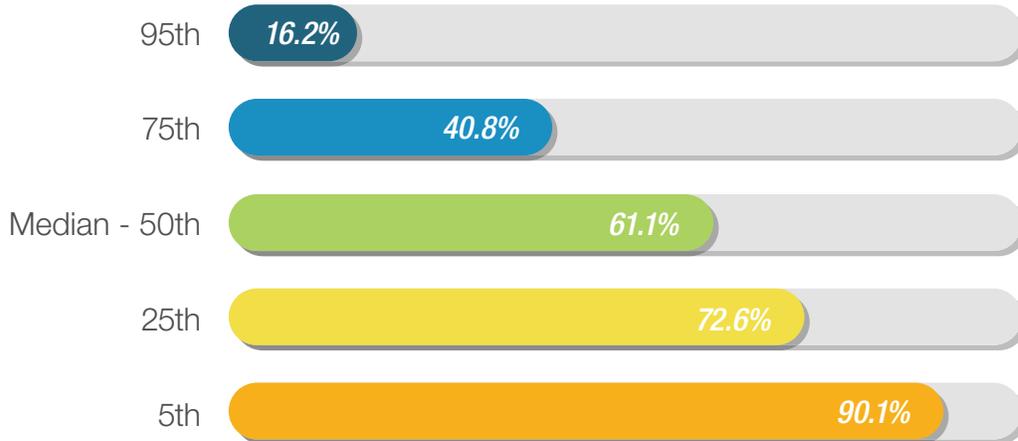
Percentile rankings are useful in comparing your 2016 revenue to the industry and sub-groups. For Example, If your business's revenue is in the 70th percentile, 70% of the participants' revenue is lower than yours.

Boost Revenue
 Increase your revenue by retaining more clients, and increasing referrals from clients and professionals. Go to homecarepulse.com to learn how the Home Care Pulse Satisfaction Management Program can help.

Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.

Client Turnover Rates

6.3 Client Turnover Rate for 2016 - Percentile Ranking



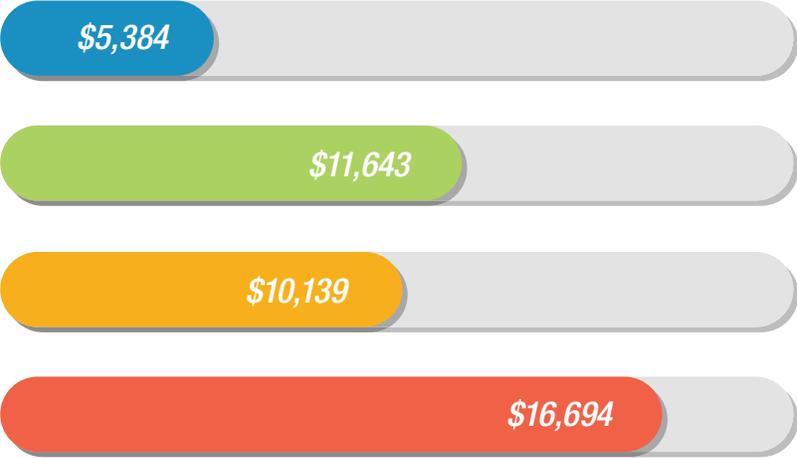
Client Turnover — A provider has to be in business for one full-calendar year to be included in the turnover calculations. Basic client turnover is calculated by taking the number of clients who stopped services in 2016 and dividing it by the average number of clients serviced in 2016.

Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.



Client Average Lifetime Value

6.9 Median Client Average Lifetime Value for 2016 - Revenue Ranges



- \$0 - 799K
- \$800K - 1.599M
- \$1.6M - 2.799M
- Leaders - \$2.8M+

! **Increase Lifetime Value**
Use detailed satisfaction reports to boost your client average lifetime value. Learn more on page 219.



Client Satisfaction

7.4 Industry Average Client Satisfaction Scores

Home Care Pulse conducted over 75,000 satisfaction interviews with home care clients in 2016. Below are the average satisfaction scores for the ten rated categories.

These questions focus on the caregiver, office staff, and overall quality of care. The lowest scores from last year involved the office staff, please see the operations section starting on **page 177** to view data pertaining to office staff.



The first four rated questions focus on the caregivers.

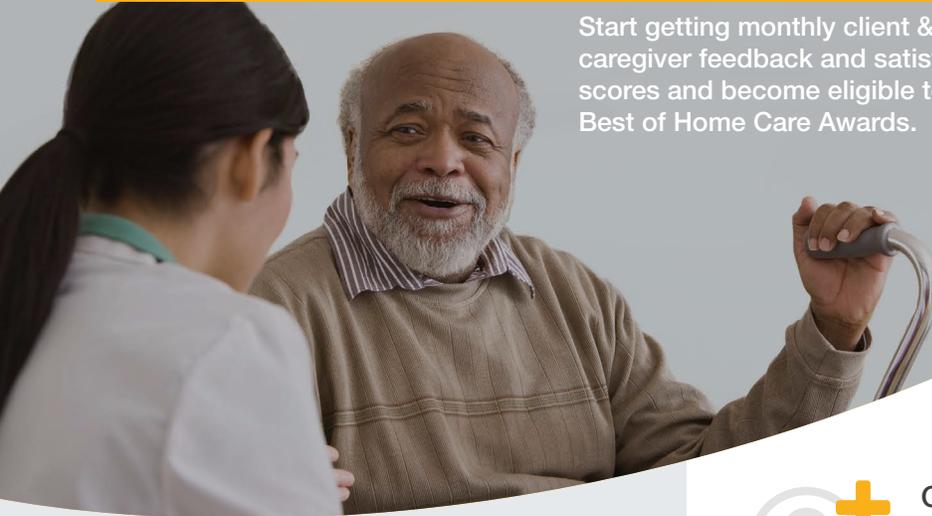
The next three rated questions focus on office staff and scheduling.

The last three rated questions focus on the overall quality and impact of the care provided.

BECOME AN

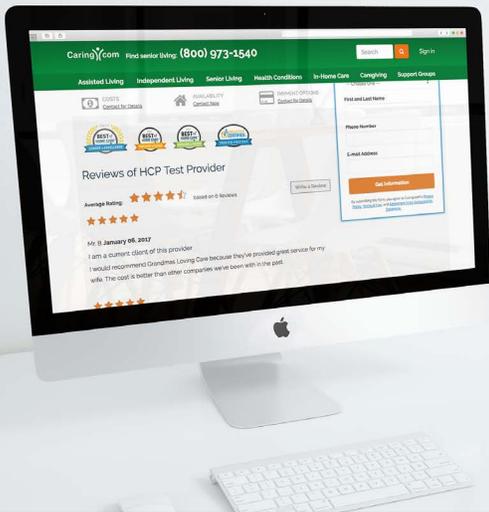
AWARD-WINNING PROVIDER

Start getting monthly client & caregiver feedback and satisfaction scores and become eligible to earn Best of Home Care Awards.



SHOWCASE
BEST OF HOME CARE®
AWARDS ON

CARING.COM



GET STARTED

Enroll in the Home Care Pulse Satisfaction Management Program and become eligible to start earning awards like Best of Home Care – Provider of Choice and Best of Home Care – Employer of Choice.



BECOME AN AWARD-WINNER

Based on your scores after 6 months, qualify for Best of Home Care Awards you can use as proof of quality and provide third-party validation of your excellent care in your marketing and sales efforts.



INCREASE ONLINE REVIEWS & CLIENT REFERRALS

Enhance your Caring.com listing with your Best of Home Care awards and new reviews gathered from your clients each month. To learn more, visit www.homecarepulse.com/integrations/caring-dot-com/

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free demo today!**

Mention the 2017 Home Care
Benchmarking Study
when you sign up to
SAVE \$150
on your account setup.

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