The 8th Annual Edition of the HOME CARE 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®
Endorsed by: Home Care Association of America
### Finance

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue Percentile Rankings</td>
<td>139</td>
</tr>
<tr>
<td>Median Revenue</td>
<td>143</td>
</tr>
<tr>
<td>Profit &amp; Loss Comparisons</td>
<td>149</td>
</tr>
<tr>
<td>Sales &amp; Marketing and Other Expenses in U.S. Dollars</td>
<td>153</td>
</tr>
<tr>
<td>Revenue Generated by Service Offerings</td>
<td>154</td>
</tr>
<tr>
<td>Payer Source Percentages</td>
<td>156</td>
</tr>
<tr>
<td>Historical Government Programs</td>
<td>156</td>
</tr>
<tr>
<td>Medicaid Revenue</td>
<td>157</td>
</tr>
<tr>
<td>Median Revenue</td>
<td>158</td>
</tr>
<tr>
<td>Weekly Billable Hours</td>
<td>169</td>
</tr>
<tr>
<td>Billing Rates</td>
<td>160</td>
</tr>
</tbody>
</table>

### Operations

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Offerings</td>
<td>179</td>
</tr>
<tr>
<td>Client Turnover Rates</td>
<td>181</td>
</tr>
<tr>
<td>Client Average Length of Service</td>
<td>183</td>
</tr>
<tr>
<td>Client Average Lifetime Value</td>
<td>184</td>
</tr>
<tr>
<td>Sales per Full-Time Employee</td>
<td>186</td>
</tr>
<tr>
<td>Staffing Summary</td>
<td>188</td>
</tr>
<tr>
<td>Technology</td>
<td>190</td>
</tr>
<tr>
<td>Affordable Care Act</td>
<td>191</td>
</tr>
<tr>
<td>Audits</td>
<td>193</td>
</tr>
</tbody>
</table>

### Client Experience

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Promoter Score (NPS)</td>
<td>210</td>
</tr>
<tr>
<td>Client Satisfaction</td>
<td>212</td>
</tr>
<tr>
<td>Caregiver Engagement Score (CES)</td>
<td>214</td>
</tr>
<tr>
<td>Caregiver Satisfaction</td>
<td>216</td>
</tr>
<tr>
<td>Home Care Pulse Satisfaction Management Program</td>
<td>218</td>
</tr>
<tr>
<td>Online Monthly Reports</td>
<td>219</td>
</tr>
<tr>
<td>Best of Home Care®</td>
<td>220</td>
</tr>
<tr>
<td>Our Integrated Software Partners</td>
<td>221</td>
</tr>
<tr>
<td>Caring.com Integration</td>
<td>221</td>
</tr>
<tr>
<td>What Home Care Providers Are Saying</td>
<td>222</td>
</tr>
<tr>
<td>Monitoring &amp; Managing Your Online Reputation</td>
<td>223</td>
</tr>
</tbody>
</table>

### Other Topics

- Delivering Care to Dementia & Alzheimer’s Clients Over the Next Quarter Century: 227
- Coping with Compassion Fatigue in Agency Owners and Staff: 231
- Addressing the Loneliness Epidemic: Good for Seniors, Good for Business: 236
## Overall Participation Summary

### 1.1 Historical Total Participation

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Providers Participated</th>
<th>Total Locations Represented</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013 Study</td>
<td>617</td>
<td>880</td>
</tr>
<tr>
<td>2014 Study</td>
<td>551</td>
<td>946</td>
</tr>
<tr>
<td>2015 Study</td>
<td>701</td>
<td>1,054</td>
</tr>
<tr>
<td>2016 Study</td>
<td>1,231</td>
<td>1,047</td>
</tr>
<tr>
<td>2017 Study</td>
<td>646</td>
<td></td>
</tr>
</tbody>
</table>

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

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

NEW HAMPSHIRE
Visiting Angels – Auburn
Visiting Angels – Nashua
Visiting Angels – Stratham

NEVADA
Eden Home Care

NEW JERSEY
Comfort Keepers – Haddonfield
Comfort Keepers – Morristown
Homewatch CareGivers – South Orange

NEW YORK
FirstLight HomeCare of Westchester

NEW YORK
Synergy Home Care – Carlisle
Visiting Angels – Lewisburg

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
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

- **Caregiver Shortages**
  - 2015 Study: 62.8%
  - 2016 Study: 69.7%
  - 2017 Study: 76.8%
- **Caregiver Turnover**
  - 2015 Study: 22.1%
  - 2016 Study: 22.4%
  - 2017 Study: 31.6%
- **Fight for $15 Wage Battle (increase in minimum wage)**
  - 2015 Study: N/A
  - 2016 Study: 26.6%
  - 2017 Study: 30.9%
- **Attracting Enough Referrals**
  - 2015 Study: 17.8%
  - 2016 Study: 21.6%
  - 2017 Study: 25.0%
- **Increasing Competition**
  - 2015 Study: 29.6%
  - 2016 Study: 19.6%
  - 2017 Study: 19.6%

Survey participants were asked, "What do you see as the top three threats to the future growth of your business in 2017?"
Inquiry Tracking Comparison

3.21 Inquiry Tracking Comparison - Median Revenue for 2016

- Track Every Inquiry: $1,780,000
- Do Not Track Every Inquiry: $1,290,532

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: $1,800,000
- Less than 45% Ratio: $1,490,000

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](http://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

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

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

<table>
<thead>
<tr>
<th>Percentile</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>95th</td>
<td>11.0%</td>
</tr>
<tr>
<td>75th</td>
<td>34.3%</td>
</tr>
<tr>
<td>Median - 50th</td>
<td>65.7%</td>
</tr>
<tr>
<td>25th</td>
<td>107.1%</td>
</tr>
<tr>
<td>5th</td>
<td>191.2%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Percentile</th>
<th>Client Turnover Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>95th</td>
<td>16.2%</td>
</tr>
<tr>
<td>75th</td>
<td>40.8%</td>
</tr>
<tr>
<td>Median - 50th</td>
<td>61.1%</td>
</tr>
<tr>
<td>25th</td>
<td>72.6%</td>
</tr>
<tr>
<td>5th</td>
<td>90.1%</td>
</tr>
</tbody>
</table>

**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

- $5,384
- $11,643
- $10,139
- $16,694

$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.

<table>
<thead>
<tr>
<th>Category</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Ethic</td>
<td>9.11</td>
</tr>
<tr>
<td>Knowledge</td>
<td>9.05</td>
</tr>
<tr>
<td>Compassion</td>
<td>9.41</td>
</tr>
<tr>
<td>Professionalism</td>
<td>9.34</td>
</tr>
<tr>
<td>Confidence</td>
<td>8.78</td>
</tr>
<tr>
<td>Communication</td>
<td>8.72</td>
</tr>
<tr>
<td>Match Caregiver</td>
<td>8.90</td>
</tr>
<tr>
<td>Services as Expected</td>
<td>9.08</td>
</tr>
<tr>
<td>Recommend</td>
<td>9.09</td>
</tr>
<tr>
<td>Impact of Services</td>
<td>9.17</td>
</tr>
</tbody>
</table>

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
Showcase Best of Home Care® Awards on Caring.com

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

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/

Visit homecarepulse.com
Request a free demo today!

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

info@homecarepulse.com
877.307.8573
homecarepulse.com