

The 8th Annual Edition of the

**HOME CARE**

**BENCHMARKING  
STUDY**

**2017**

TM

For the Private Duty Home Care Industry

# SnapShot Report

Purchase the complete “2017 Home Care Benchmarking Study”  
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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

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Association of America

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*Highlighted pages below are included in this SnapShot Report.*

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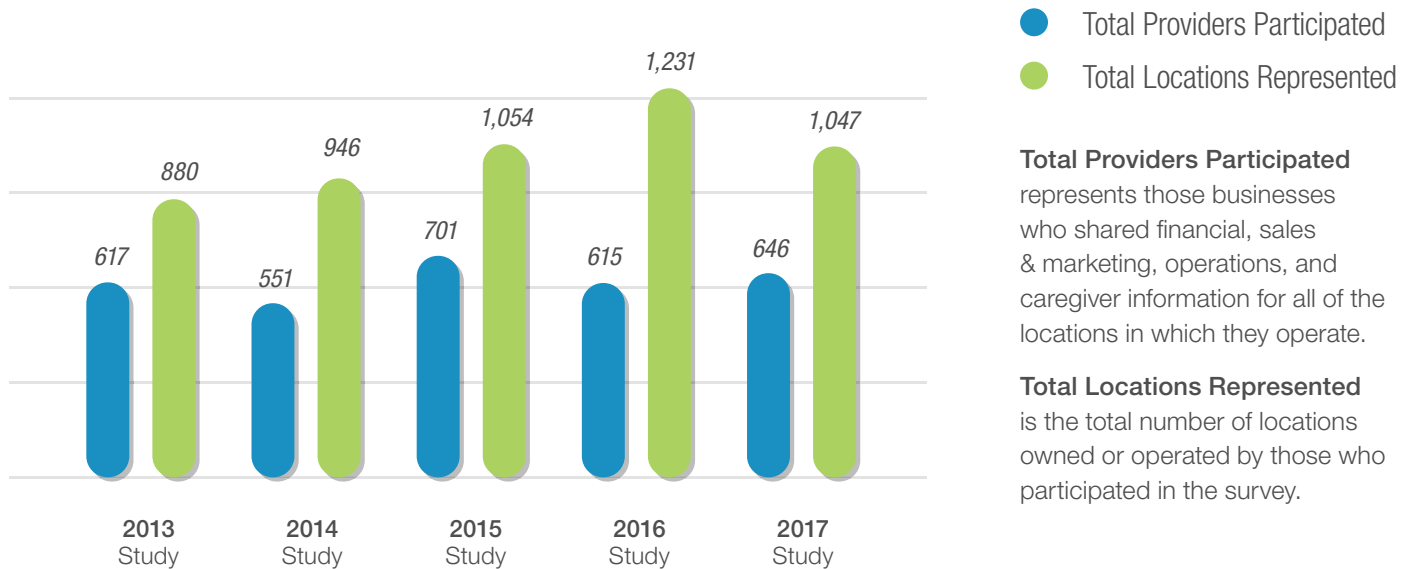
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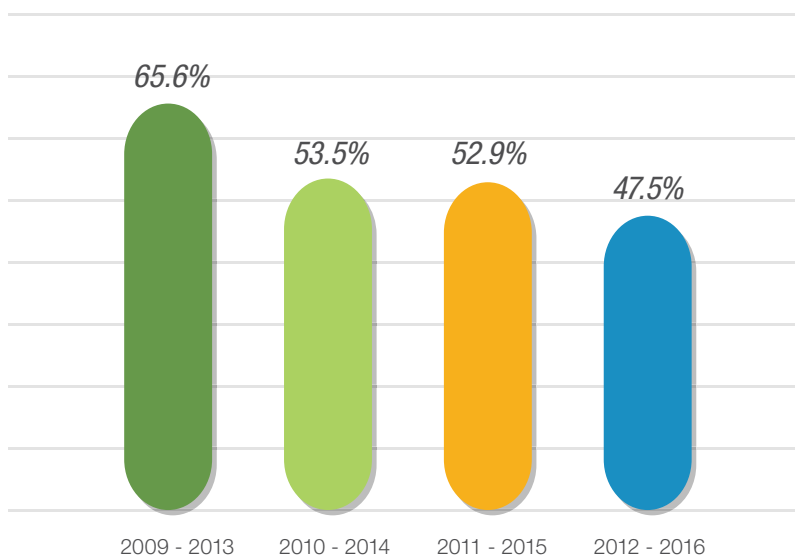
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# Overall Participation Summary

## 1.1 Historical Total Participation



## 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

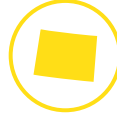
Right at Home – Central Arkansas



#### 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

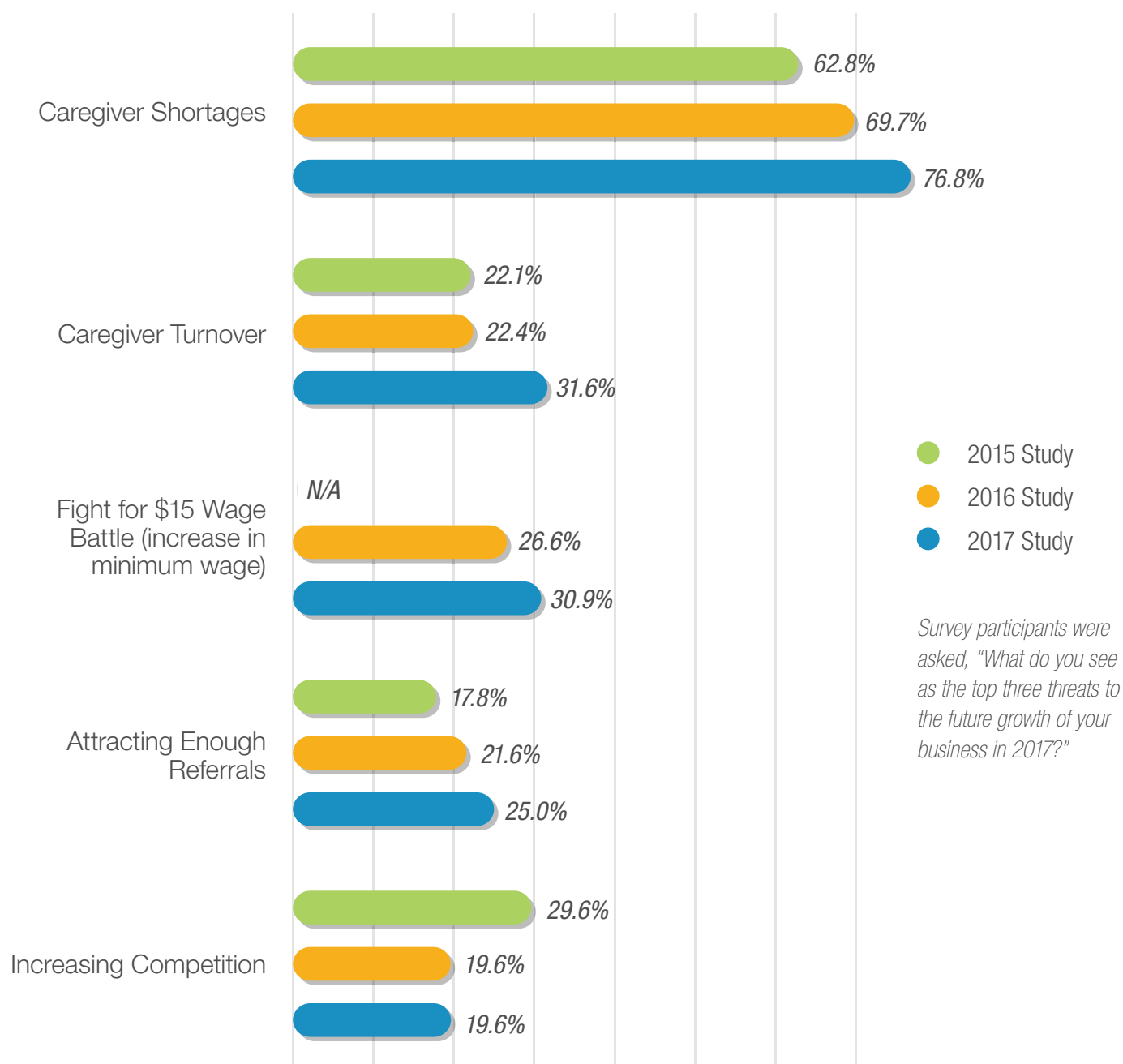
*“We have been a Home Care Pulse client since June of 2013, we wish we had joined sooner. The insight the Home Care Pulse program has given us has been instrumental in helping us recognize potential problems in the field and correct them before they became a problem. It is by reading the Home Care Pulse 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

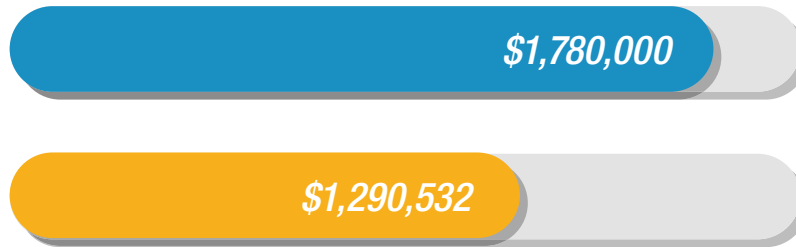
### 3.13 Top 5 Threats Facing Home Care Providers - Historical





## Inquiry Tracking Comparison

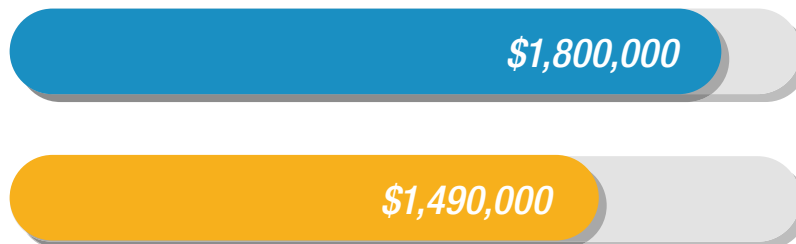
### 3.21 Inquiry Tracking Comparison - Median Revenue for 2016



- 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](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

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.

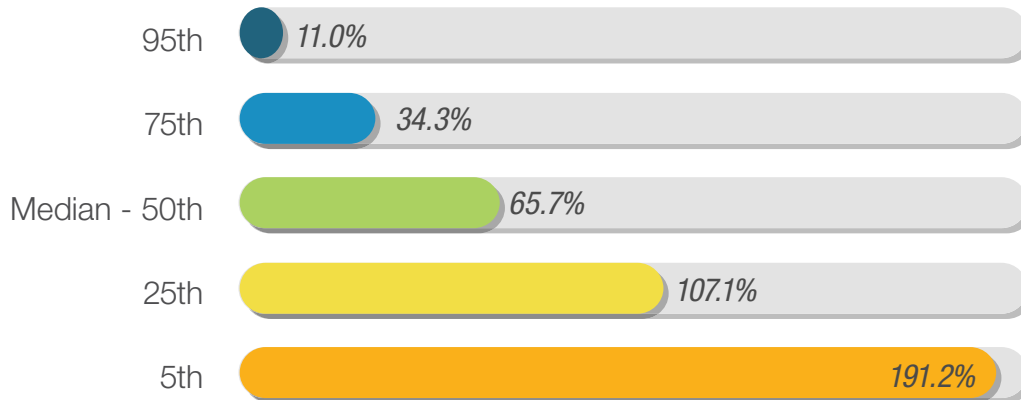
If you would like to learn more about the reasons why your caregivers chose to work for your home care agency as well as their level of satisfaction, please contact Home Care Pulse at [homecarepulse.com](http://homecarepulse.com) or at (877) 307-8573. We'd love to talk with you about our powerful Satisfaction 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](http://homecarepulse.com).



## Caregiver Turnover Rates

### 4.15 Caregiver Turnover Rate for 2016 - Percentile Ranking

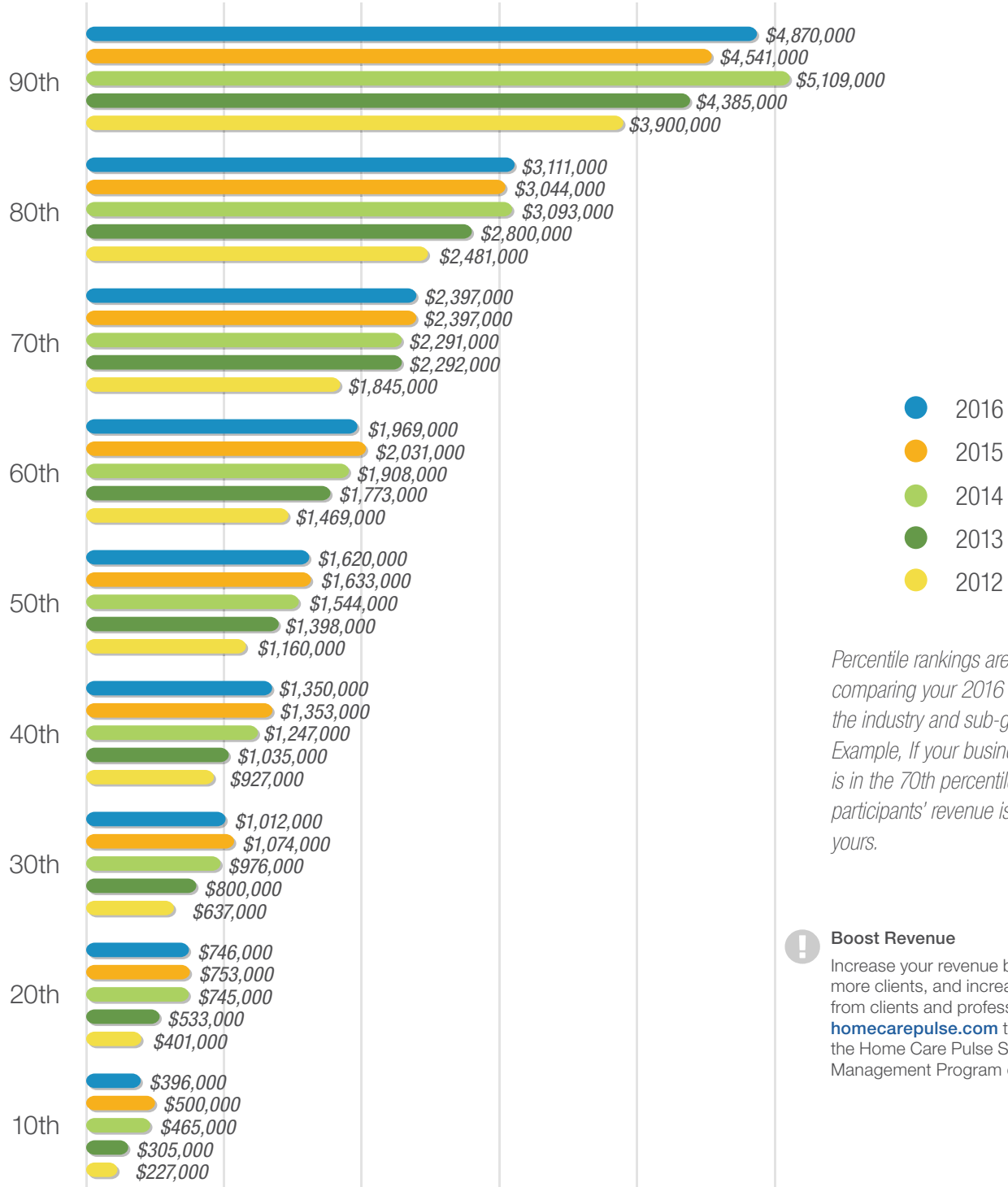


Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.



# 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.



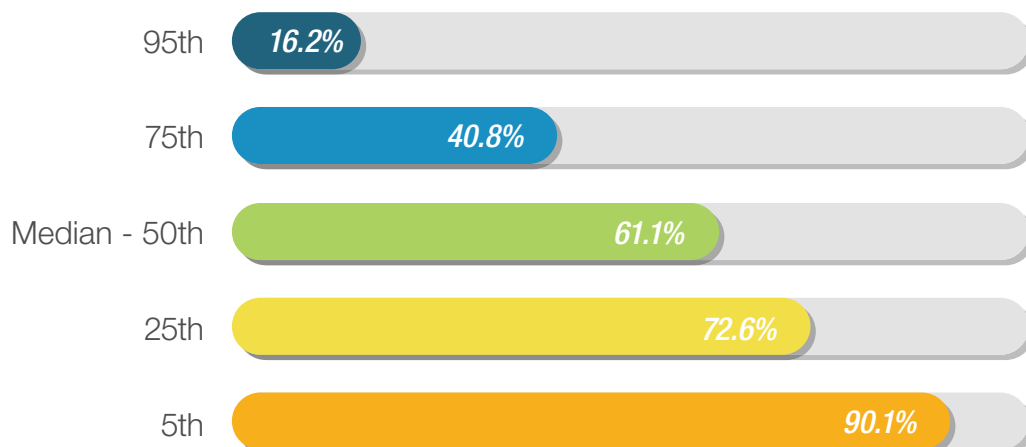
### Boost Revenue

Increase your revenue by retaining more clients, and increasing referrals from clients and professionals. Go to [homecarepulse.com](http://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.

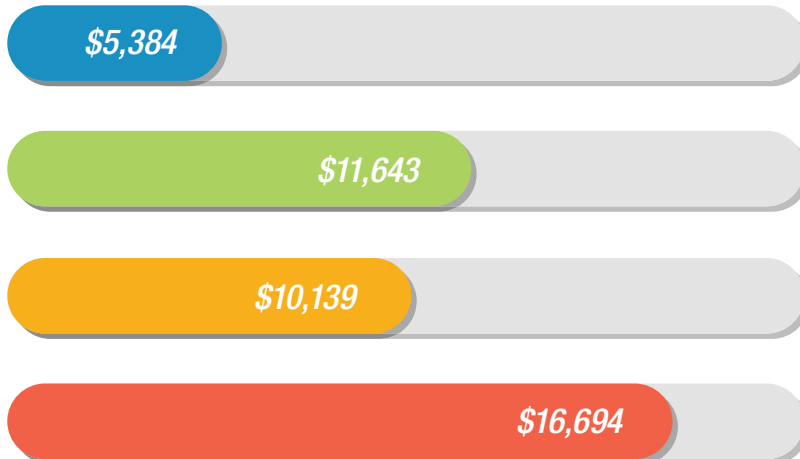
Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.





## 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](#).

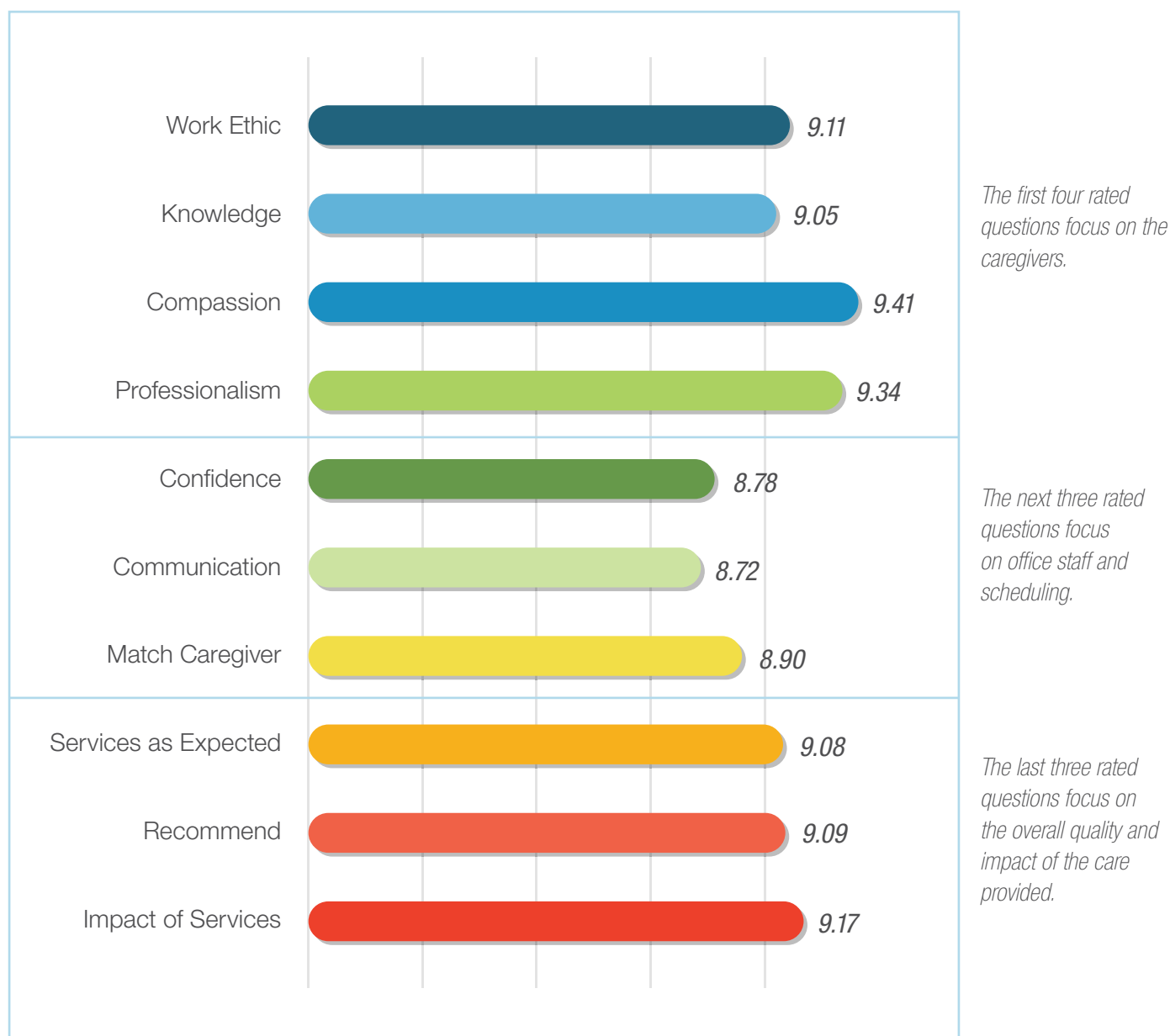


# Client Satisfaction

## 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.

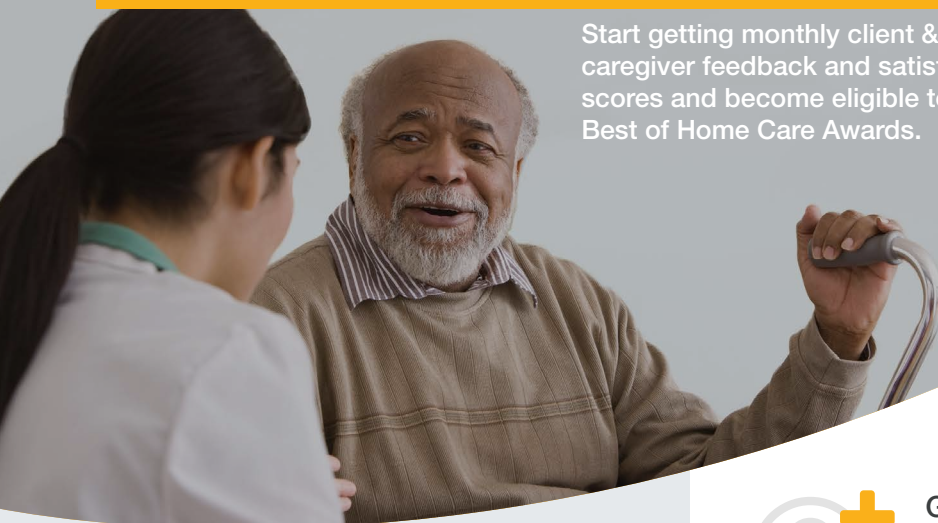
These questions focus on the caregiver, office staff, and overall quality of care. The lowest scores from last year involved the office staff, please see the operations section starting on **page 177** to view data pertaining to office staff.



# BECOME AN

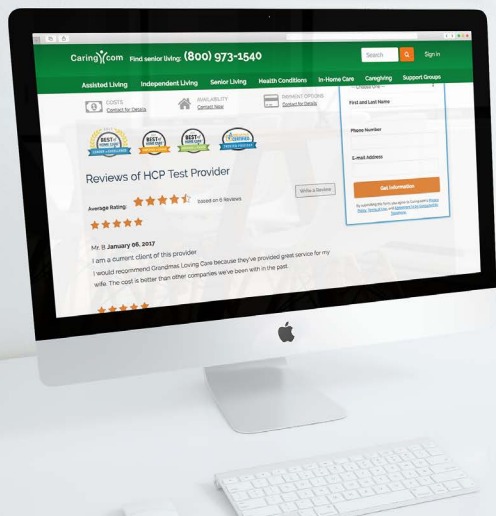
# AWARD-WINNING PROVIDER

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/](http://www.homecarepulse.com/integrations/caring-dot-com/)

Visit [homecarepulse.com](http://homecarepulse.com)  
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Mention the 2017 Home Care  
Benchmarking Study  
when you sign up to  
**SAVE \$150**  
on your account setup.

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