

HCP MANAGEMENT CONFERENCE & EXHIBITION

Confidence in Care: Resilience, Readiness, and Results

WELCOME

KEYNOTE

Home Care 20230: Factors Affecting the Future of Home Care Over the Next Five Years

SPEAKER

*Stephen Tweed, CEO,
Leading Home Care ... a Tweed Jeffries company
Founder, Home Care CEO Forum*

RISK
strategies

Session Sponsor



WHAT WILL THE HOME CARE INDUSTRY LOOK LIKE IN FIVE YEARS?



**WHAT ARE THE
FACTORS THAT ARE
SHAPING THE FUTURE
OF OUR INDUSTRY,
AND WHAT WILL BE
THE IMPACT ON HOME
CARE PROVIDERS?**

STEPHEN TWEED'S CRYSTAL BALL PREDICTION



There has never been a better time to be a leader in the **Top Tiers of **Home Care**.**



WHITE PAPER

The Future of Home Care

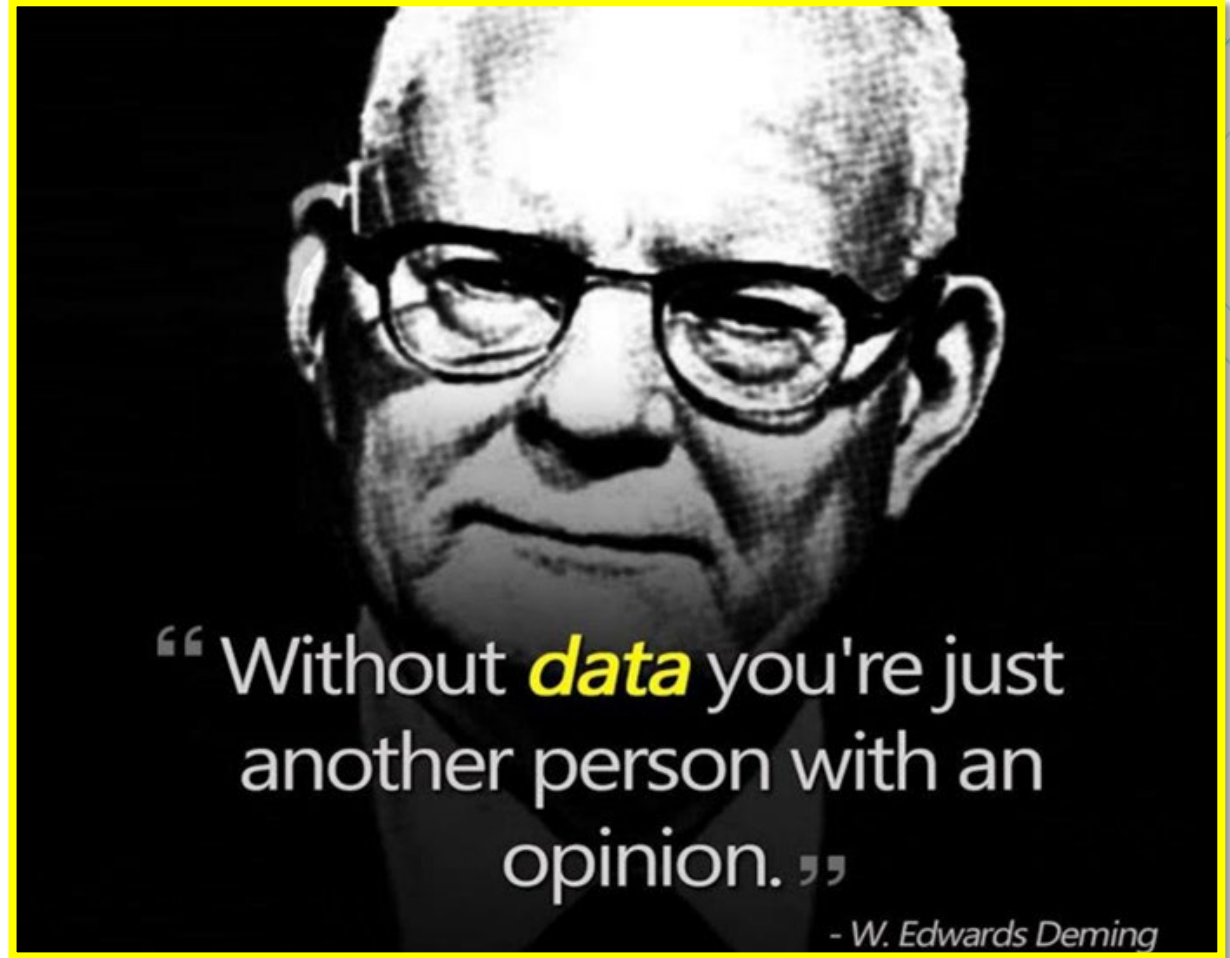
A 2025 Survey of the Home Care Industry & Future Trends



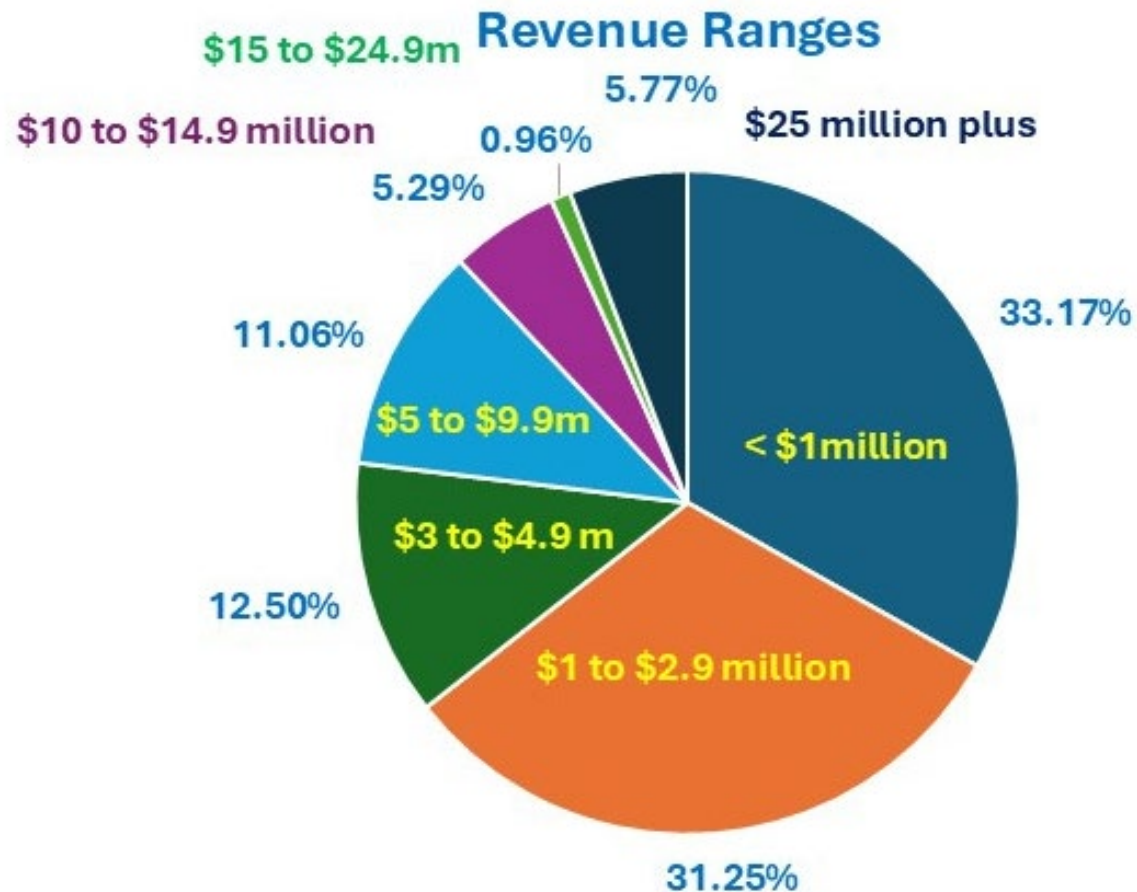
The Future of Home Care: 2025 Survey of the Home Care Industry and Future Trends.




Leading Home Care
...a TweedJeffries company

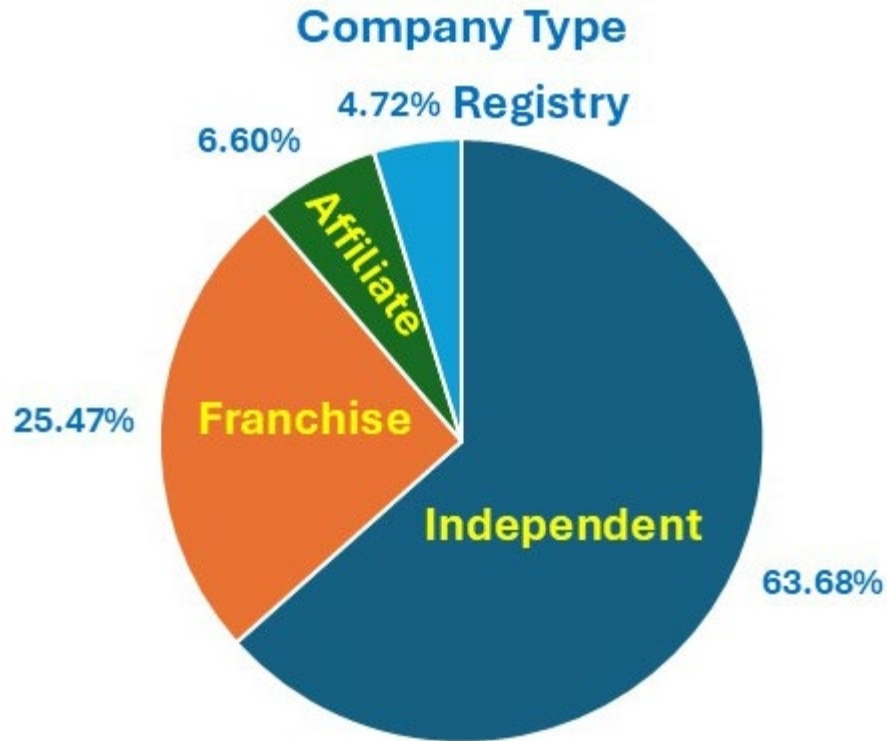


PARTICIPANTS BY COMPANY SIZE



- **Small Companies – 33.17%**
- **Median Companies – 31.25%**
- **Fast-Growing Companies – 23.56%**
- **Enterprise Companies – 12.02%**

PARTICIPANTS BY COMPANY TYPE



Independent – 63.38%

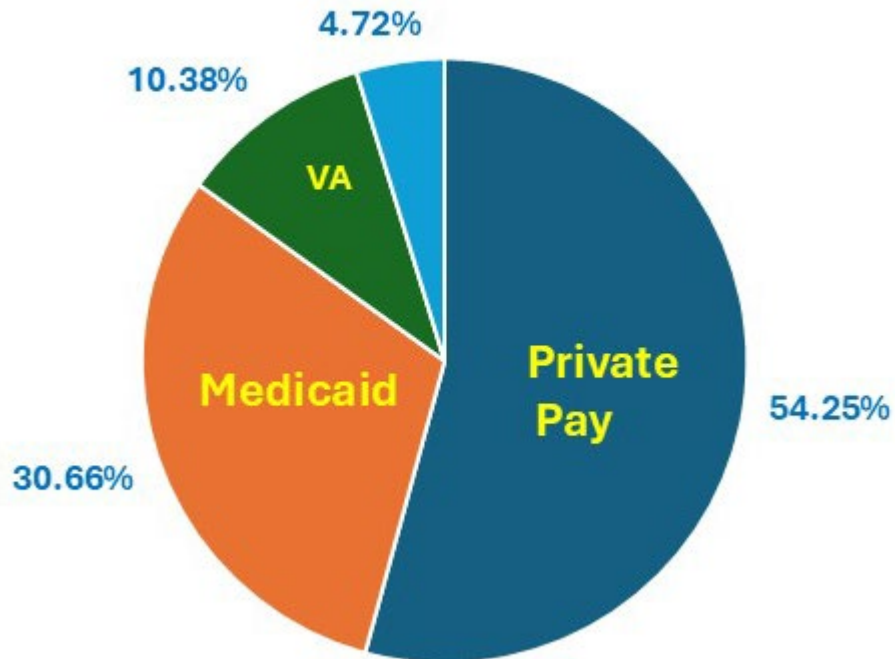
Franchise – 25.47%

Affiliate – 6.60%

Registry – 4.72%

PARTICIPANTS BY PRIMARY REVENUE SOURCE

Majority Revenue Source



Private Pay – 54.25%

Medicaid and Medicaid Wavier – 30.66%

Department of Veterans Affairs – 10.38%

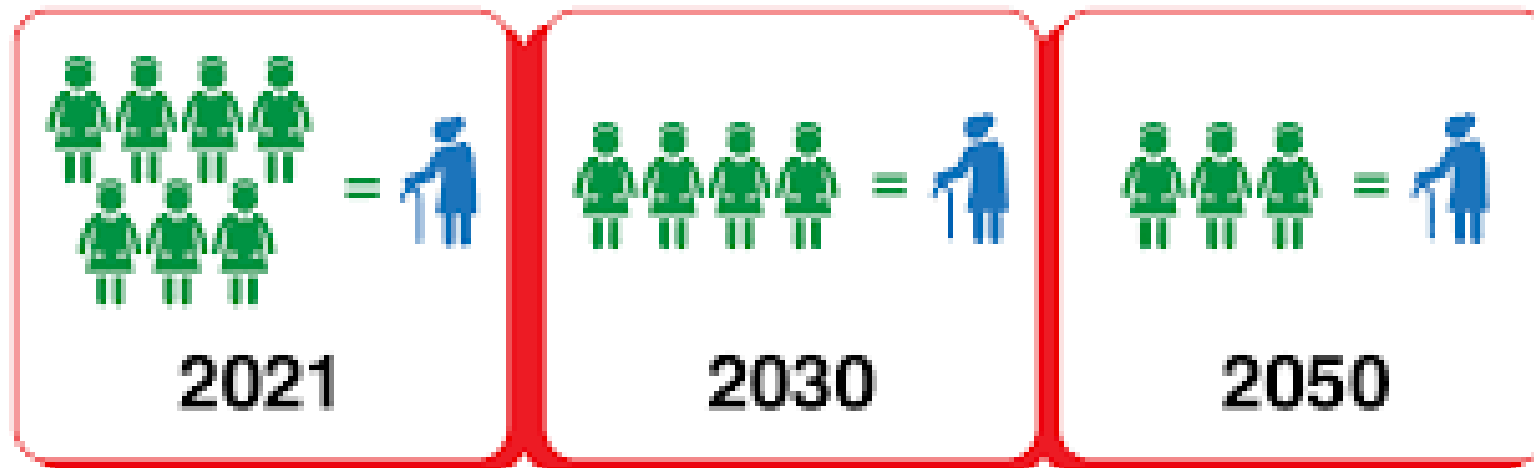
Other – 4.72%

KEY FINDINGS



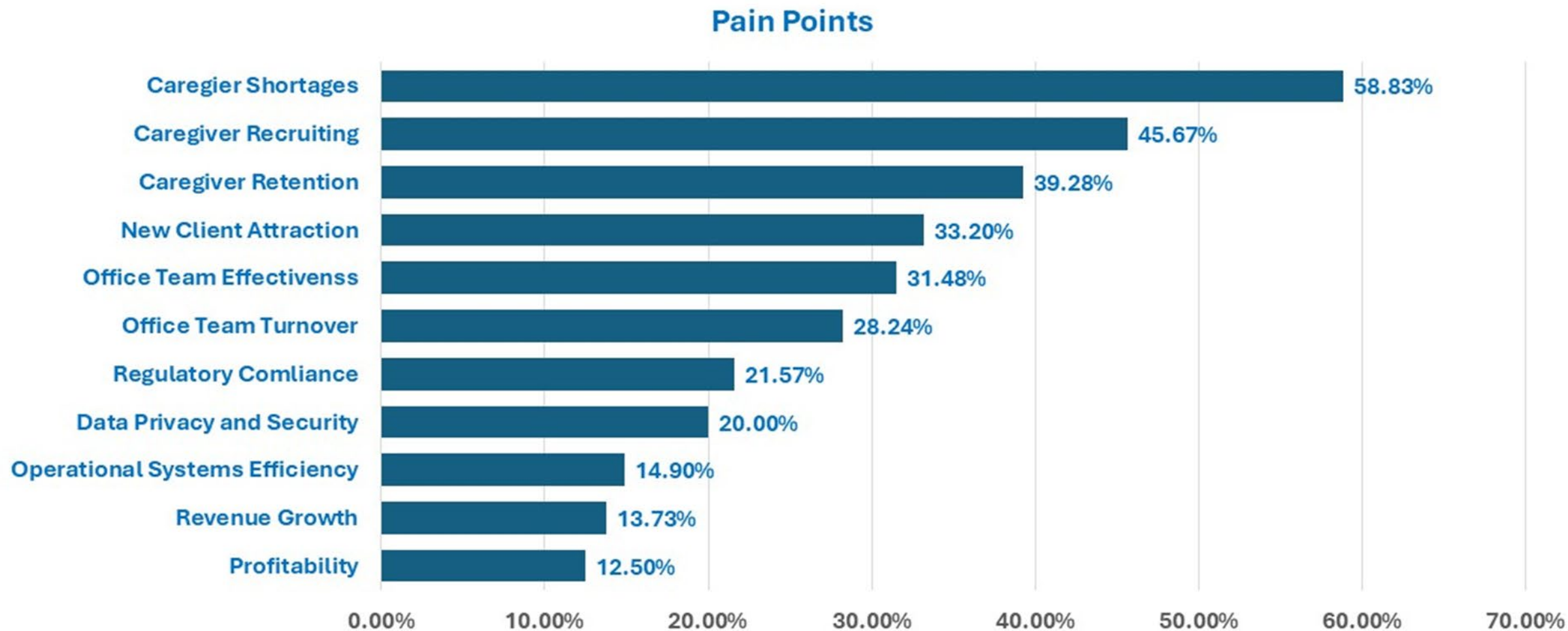
1. CAREGIVER SHORTAGES, RECRUITING, AND RETENTION ARE MAJOR PAIN POINTS FOR HOME CARE LEADERS.

Caregiver to Elderly Ratio Projection



What are the biggest pain points that will get in the way of growing your Home Care business over the next five years?

(Rate each pain point on a scale of 1 to 5 – Graph represents % of responses rated a 4 or 5)



TOP FIVE PAIN POINTS



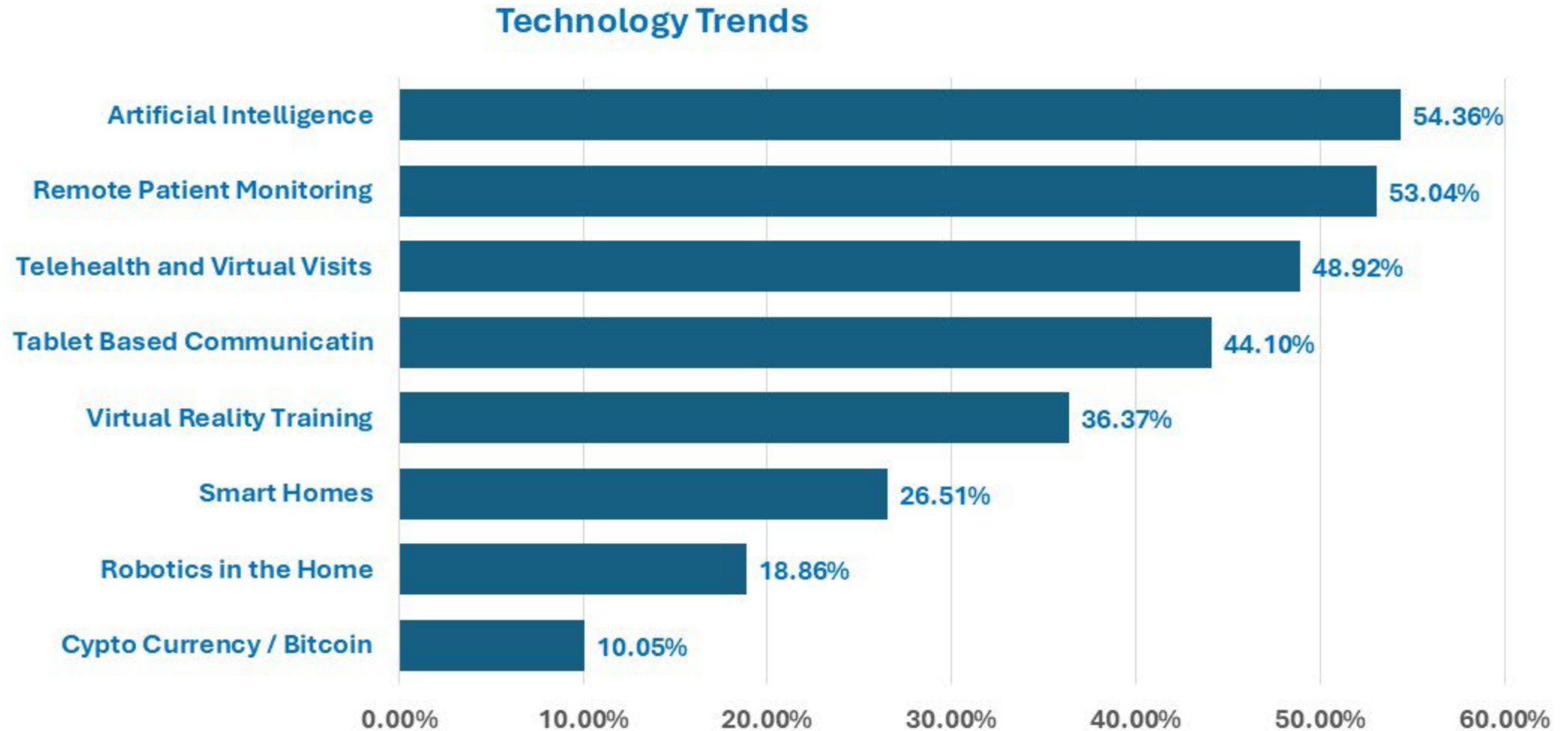
- 1. Caregiver Shortages**
- 2. Caregiver Recruiting**
- 3. Caregiver Retention**
- 4. New Client Attraction**
- 5. Office Team Effectiveness**

2. TECHNOLOGY AND AUTOMATION WILL SHAPE THE FUTURE OF HOME CARE



Which of the following technology trends do you think will have the greatest impact on transforming Home Care over the next five years? Rate each point on a scale of 1 to 5 based on where you are today.

(Graph % of represents responses of 4 or 5)



TOP FIVE TECHNOLOGY TRENDS IN HOME CARE



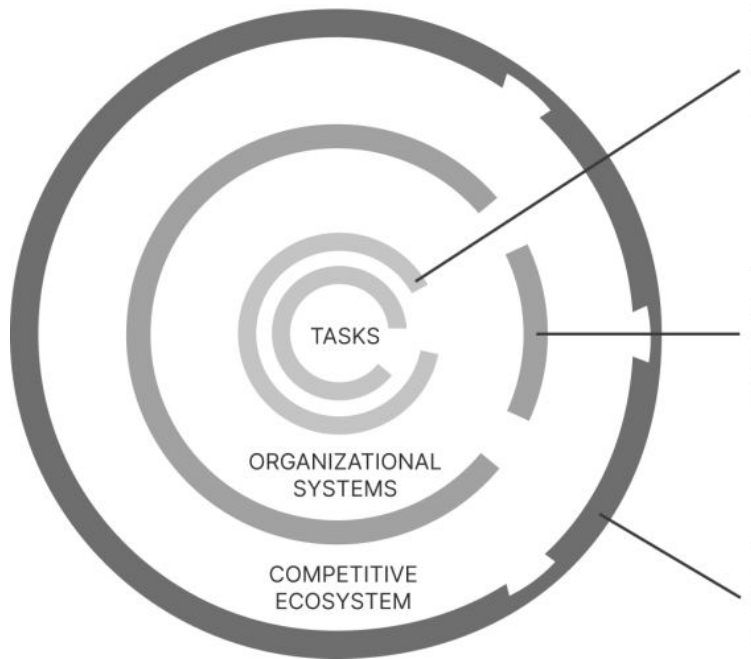
- 1. Artificial Intelligence**
- 2. Remote Patient Monitoring**
- 3. Telehealth and Virtual Visits**
- 4. Tablet Based Communication**
- 5. Virtual Reality Training**

TOP FIVE AI TRENDS IN HOME CARE



- 1. Client / Caregiver Matching**
- 2. Scheduling and Workforce Optimization**
- 3. Recruitment & Retention**
- 4. Care Plan Personalization**
- 5. Administrative Automation**

THREE LEVELS OF AI APPLICATION



- 1. Tasks** - AI restructures roles helps put tasks into repeatable workflows.
- 2. Organizational Systems** - AI will continuously improve systems inside companies to increase performance and reliability across the company.
- 3. Competitive Ecosystem** - AI will help organizations restructure the way they do business to create strategic market advantage.

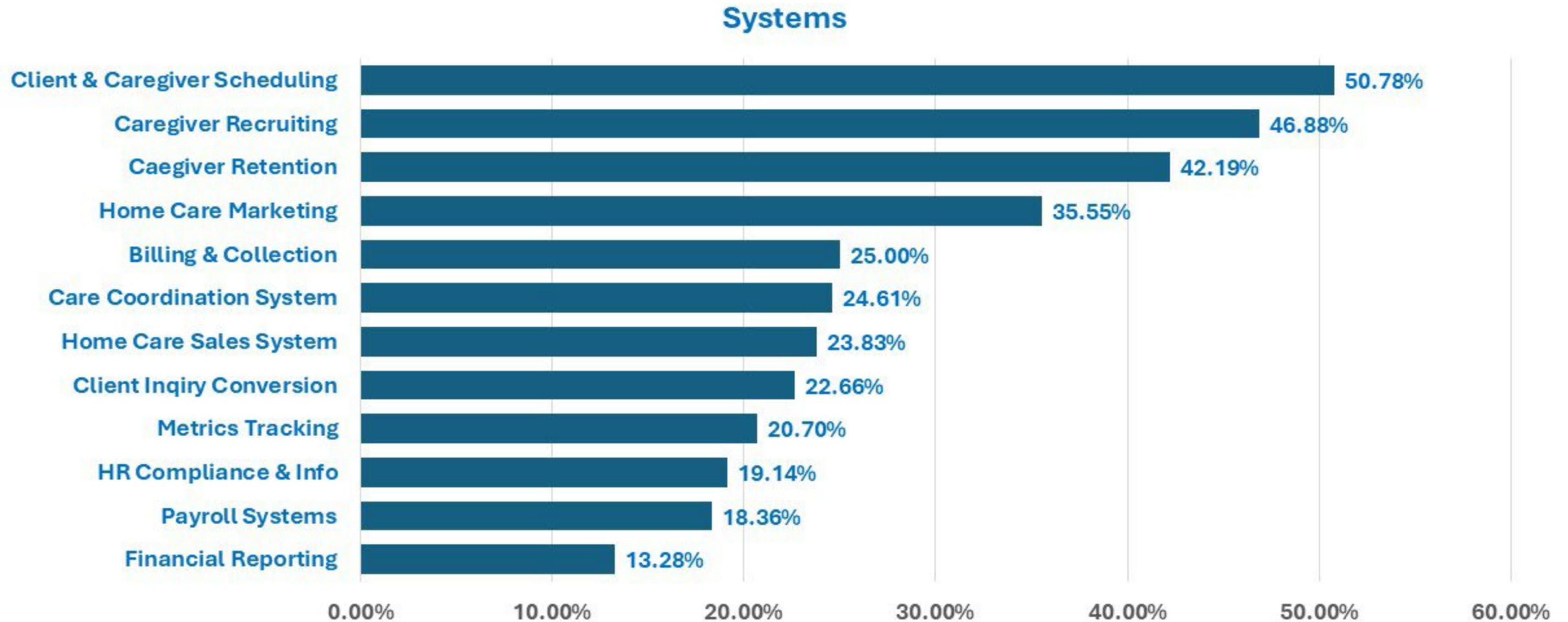
Source: Sangeet Paul Choudary - RESHUFFLE

3. CLIENT AND CAREGIVER SCHEDULING EMERGES AS THE TOP SYSTEM PRIORITY FOR FUTURE GROWTH.



Which of the following 12 systems do you feel are most important for you to leverage in the future to scale your Home Care company?

(Pick the three most important)



TOP FIVE SYSTEMS FOR THE FUTURE



1. **Client and Caregiver Scheduling**
2. **Caregiver Recruiting**
3. **Caregiver Retention**
4. **Home Care Marketing**
5. **Billing and Collection**

4. INDUSTRY CONSOLIDATION AND PRIVATE EQUITY ENTRY MEAN DRAMATICALLY INCREASED COMPETITION



THE IN-HOME PERSONAL CARE INDUSTRY – 29,000 COMPANIES IN 2025



Independents – 13,000

Franchises – 8,540

Affiliated – 5,000

Registries – 2,000



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HOME CARE



At Your Side
HOME CARE



Seniors
Helping
Seniors®



Partners in Care®
Private, professional home care



2024 REVENUE BENCHMARKS FOR HOME CARE COMPANIES

Industry Median -	\$2,301,088
Franchise Average -	\$1,305,479
“Leaders” - \$2.8M+ -	\$3,775,366
Top 10% Mastermind -	\$4,870,000
Masters (\$5M +) -	\$6,955,075
95th% -	\$11,880,204
Top 5% Mastermind Group -	\$14,861,281



HOME CARE FRANCHISE COMPANIES

- **59 companies offering Home Care franchises**
- **8,450 Franchise Units**
- **Franchise Average Revenue - \$1,305,479**
- **The top 20 companies have 100 or more units**
- **8 companies have between 50 and 87 units**
- **28 companies have less than 35 units**
- **12 companies that previously offered franchises no long offer them**
- **9 Companies that previously sold franchises have gone out of business.**

Source: Leading Home Care – August 2024



THE TOP 15 FRANCHISE HOME CARE COMPANIES

Total Revenue = \$8,660,549,438

Total Franchise Units = 6634

Average Revenue per Unit = \$1,305,479



Source: 2023 Franchise Times Top 400 Franchises

Franchise Times
TOP 400

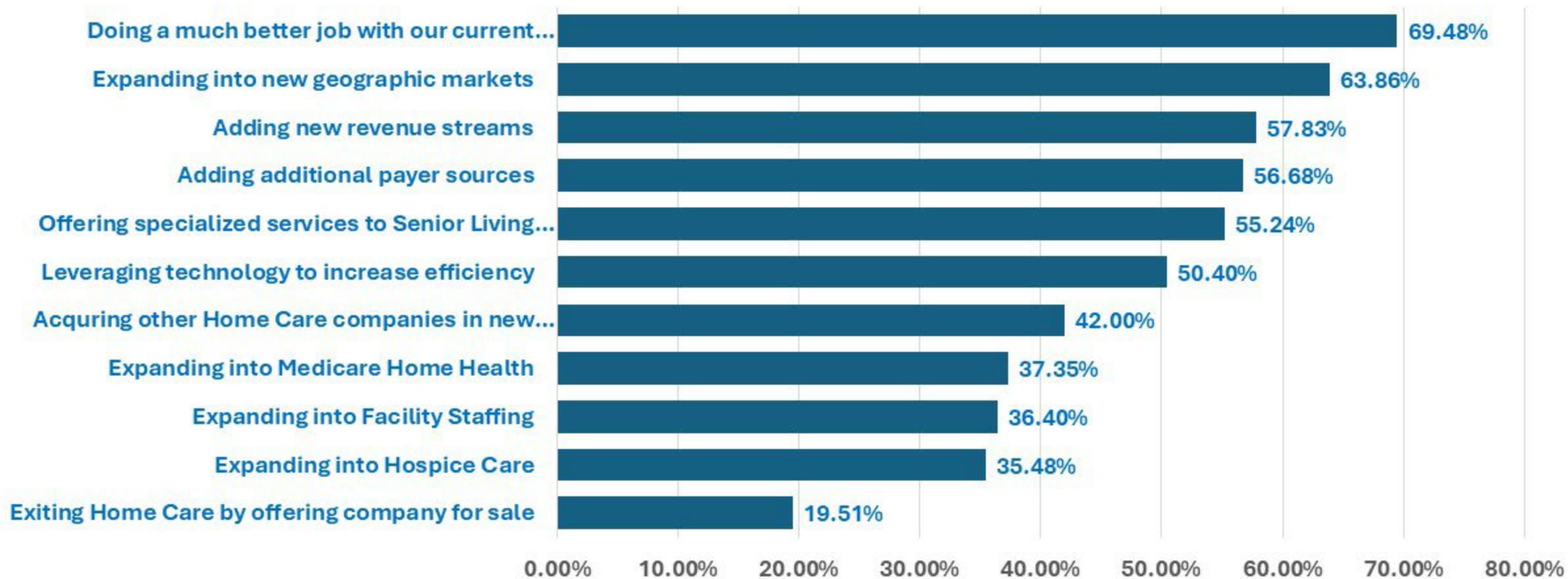


5. GROWTH OPPORTUNITIES – STICK TO YOUR KNITTING, AND EXPAND GEOGRAPHY



What do you see as the greatest growth opportunities for Home Care companies in the next five years? Rate each point on a scale of 1 to 5 based on where you are today. (Graph % of represents responses of 4 or 5)

Growth Opportunities



TOP FIVE GROWTH OPPORTUNITIES



- 1. Doing a much better job with our current business model in our current marketplace**
- 2. Expanding to new Geographic Markets**
- 3. Adding new Revenue Streams**
- 4. Adding new Payer Sources**
- 5. Offering Specialized Services to Senior Living**

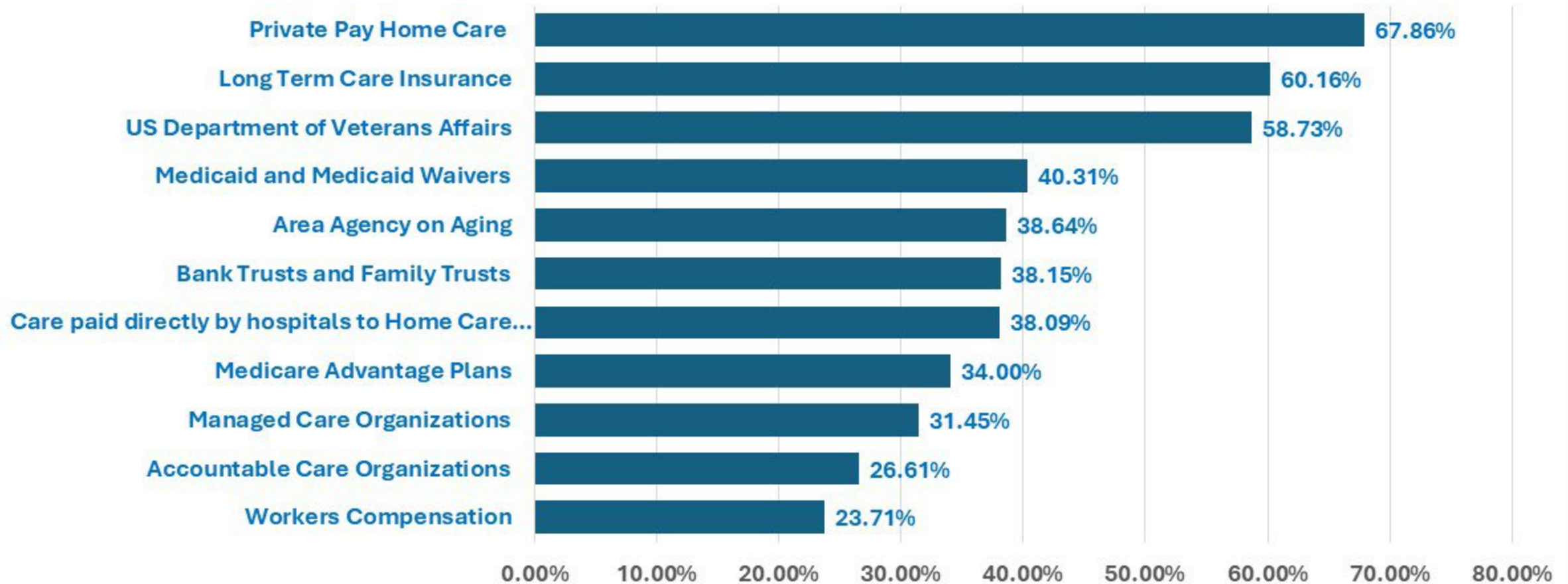
6. PRIVATE PAY CONTINUES TO LEAD THE LIST OF PAYER SOURCES, WHILE OTHER SOURCES GAIN GROUND



Based on your current business model, which payer sources will provide the greatest opportunity for growth in the next five years? Rate each point on a scale of 1 to 5 based on where you are today.

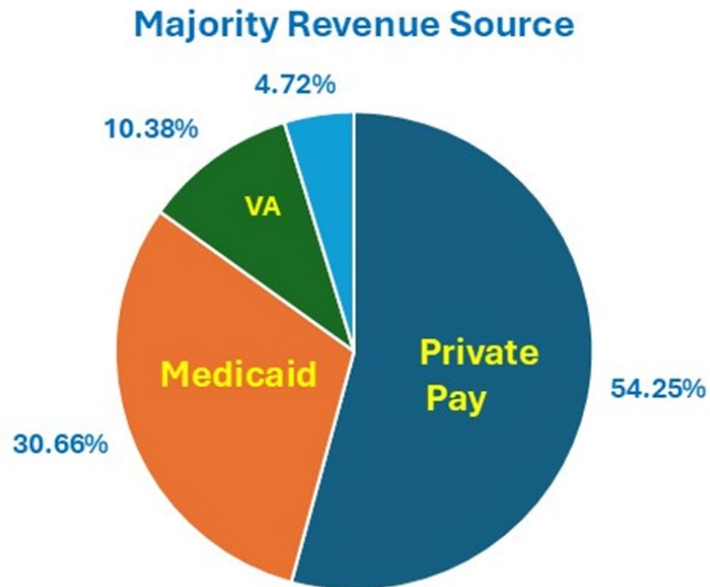
(Graph % of represents responses of 4 or 5)

Payer Sources



TOP FIVE PAYER SOURCES FOR THE FUTURE

The Different **Home Care**
Payer Sources.



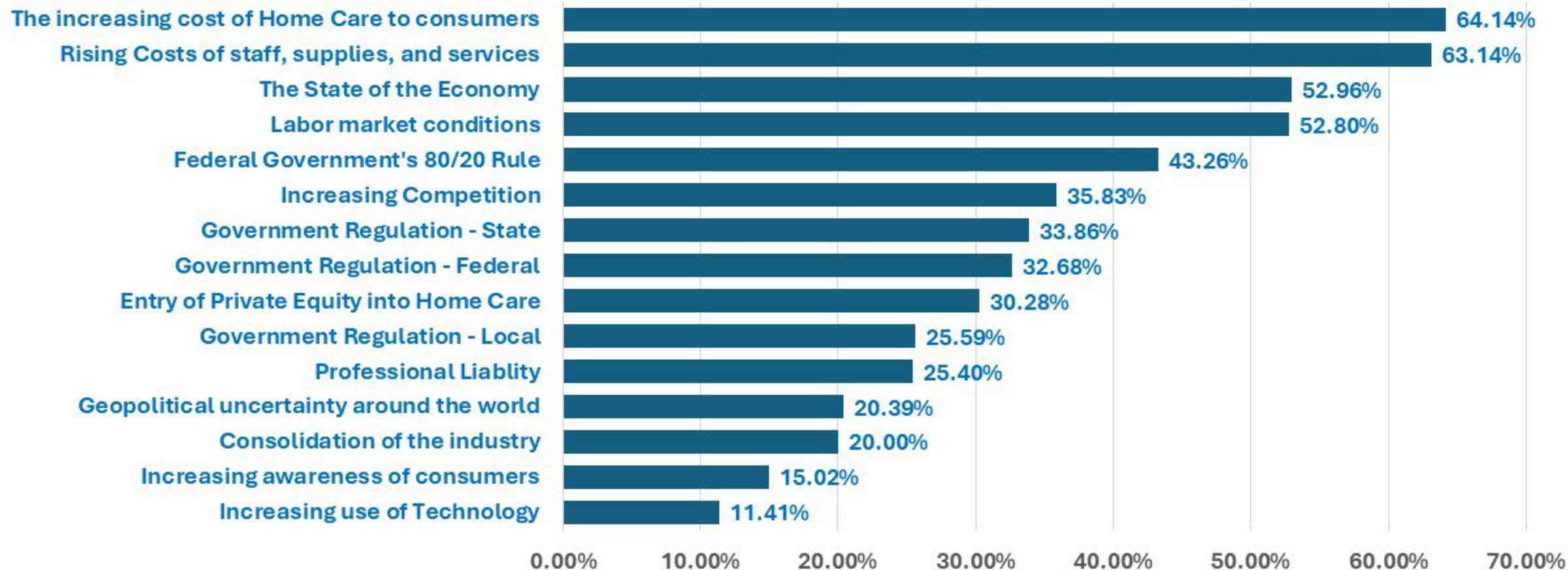
1. **Private Pay**
2. **Long Term Care Insurance**
3. **U.S. Department of Veterans Affairs (VA)**
4. **Medicaid and Medicaid Waivers**
5. **Area Agency on Aging**

7. OUTSIDE FORCES AND TRENDS CONTINUE TO GET IN THE WAY OF GROWTH



There are a number of external forces and trends that are shaping the future of Home Care. Often these forces are out of your control, but hinder your ability to grow your business. Rate each point on a scale of 1 to 5 based on how much it hinders your growth. (Graph % of represents responses of 4 or 5)

Trends Hindering Growth



TOP FIVE FORCES HINDERING GROWTH



- 1. Increasing Cost of Home Care to Consumers**
- 2. Rising cost of staff, supplies, and services**
- 3. The State of the Economy**
- 4. Labor Market Conditions**
- 5. Federal Government 80/20 Rule**

STEPHEN TWEED'S CRYSTAL BALL PREDICTION



What do YOU think the future will look like for Home Care in the next five years?

OUR CRYSTAL BALL PREDICTIONS



1. Your biggest pain point will continue to be **Staff Shortages**

OUR CRYSTAL BALL PREDICTIONS



2. Your Future will be shaped by Technology, and particularly AI.

OUR CRYSTAL BALL PREDICTIONS



**3. AI will reshape
Organizational Systems
and transform the
Competitive Ecosystem**

OUR CRYSTAL BALL PREDICTIONS



**4. Home Care companies
who can master
Recruiting and Retention
of Caregivers will grow
faster than the industry.**

OUR CRYSTAL BALL PREDICTIONS



**5. Companies that
Create Distinction in
the local marketplace
will have Competitive
Advantage**

OUR CRYSTAL BALL PREDICTIONS



6. Fast growing Home Care companies will focus on **Systems for Business Development.**

OUR CRYSTAL BALL PREDICTIONS



**7. Industry Leaders will
Monitor and Respond to
Industry Trends**

Calling All Home Care Industry Leaders!

Your expertise is requested to shape the future of the home care industry!

Scan Here!



Survey conducted by:

Leading Home Care
... a Tweed Jeffries Company

The Future of Home Care: 2026 Survey of the Home Care Industry and Future Trends.

Participate Now!

<https://www.surveymonkey.com/r/GNJCNFZ>

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Questions?



Send Questions anytime to:

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Thank You!



Session Survey



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