

2021 Home Health Care News Outlook Survey and Report

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 Home Health Care News



In-home care poised for growth in a post-pandemic world

Heading into last year, we thought the Patient-Driven Groupings Model (PDGM) would be the greatest change to the home health landscape in decades. And while it proved to have a significant impact, all attention took a new focus due to the acute and fast-growing COVID-19 crisis.

In just 12 months, the landscape changed dramatically. With agencies making heroic efforts this year to shift and adapt, and keep patients and employees safe, focus on in-home care delivery has risen. It's no surprise then that home care professionals see a strong future ahead, with most expecting their businesses to grow in 2021.

That is just one of the major insights culled from our annual survey of home-based care professionals. This year's survey identifies some of the specific areas of growth, as well as some of the remaining challenges in the year and years to come. We hope the survey results will help you as you look ahead to a bright future for in-home care operators, and plan for your business in the months to come.



Robert Holly
Editor, Home Health Care News

A year to reflect on lessons learned

Home Health care is an industry that changes every year. In 2020 we witnessed rapid transformation and new standards adopted to take both PDGM and the unprecedented COVID-19 pandemic into account. Now is the time to reflect on the lessons we have learned as an industry over the past year and look forward to new challenges and opportunities in 2021. We hope that the Home Health Outlook Survey will help you do exactly that.



Scott Decker
CEO, Homecare Homebase

Executive Summary

The 2021 Home Health Care News Outlook Survey and Report reveals the views of more than 350 individuals polled about the home-based care industry for 2021. The survey, conducted online from November 9 – December 7, 2020, asked agencies about:

- The greatest challenges facing the industry this year
- The expense categories associated with COVID-19 likely to have the greatest impact
- The biggest drivers of technology adoption
- The types of telehealth and remote-patient monitoring most desired in the year ahead

Results of the survey show that staffing remains the greatest challenge and opportunity for in-home care companies. Most expect their businesses to grow in the year ahead with various areas of opportunity.

Key Takeaways

1

Staffing remains the single-most challenging aspect of in-home care

With the staffing landscape changing significantly in 2020 due to the COVID-19 pandemic, and many agencies challenged with keeping both staff and care recipients safe, staffing remains the greatest challenge as well as the greatest area of COVID-19-related expense, according to the results of the survey.

2

Growth lies ahead, across care types

The overwhelming majority of respondents expect their revenues to grow in 2021, or at least to remain stable. In terms of areas of growth, respondents expect both non-skilled in-home care and skilled care in the home to be growth targets.

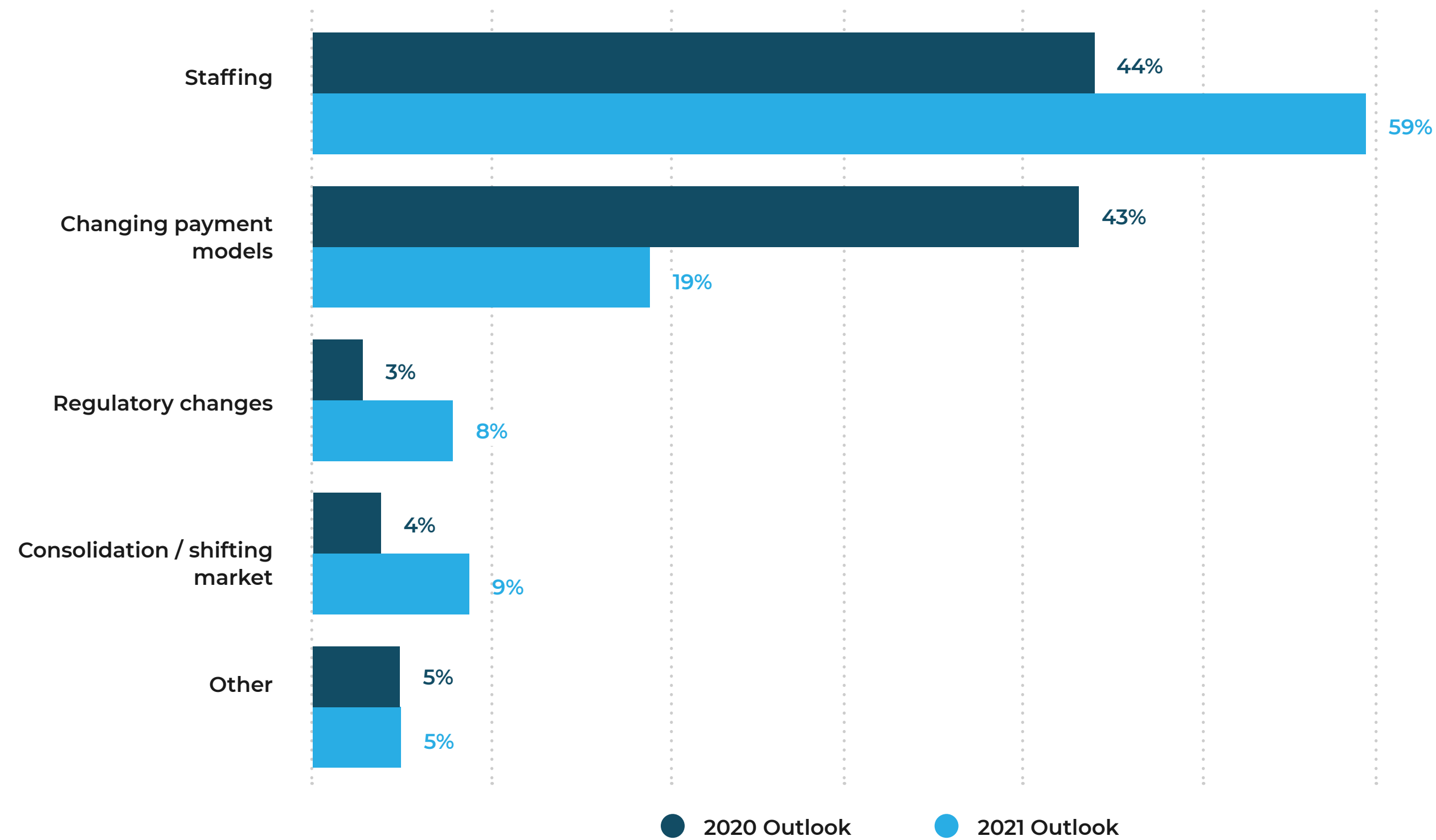
3

Telehealth and remote-patient technology rising

Among survey respondents, all indicated some type of technology consideration around remote patient monitoring or telehealth. Following relaxed regulations around telehealth due to the COVID-19 pandemic, this area is projected to be ripe for additional growth in the years to come.

What is the greatest non-COVID-19-related challenge to the in-home care industry in 2021?

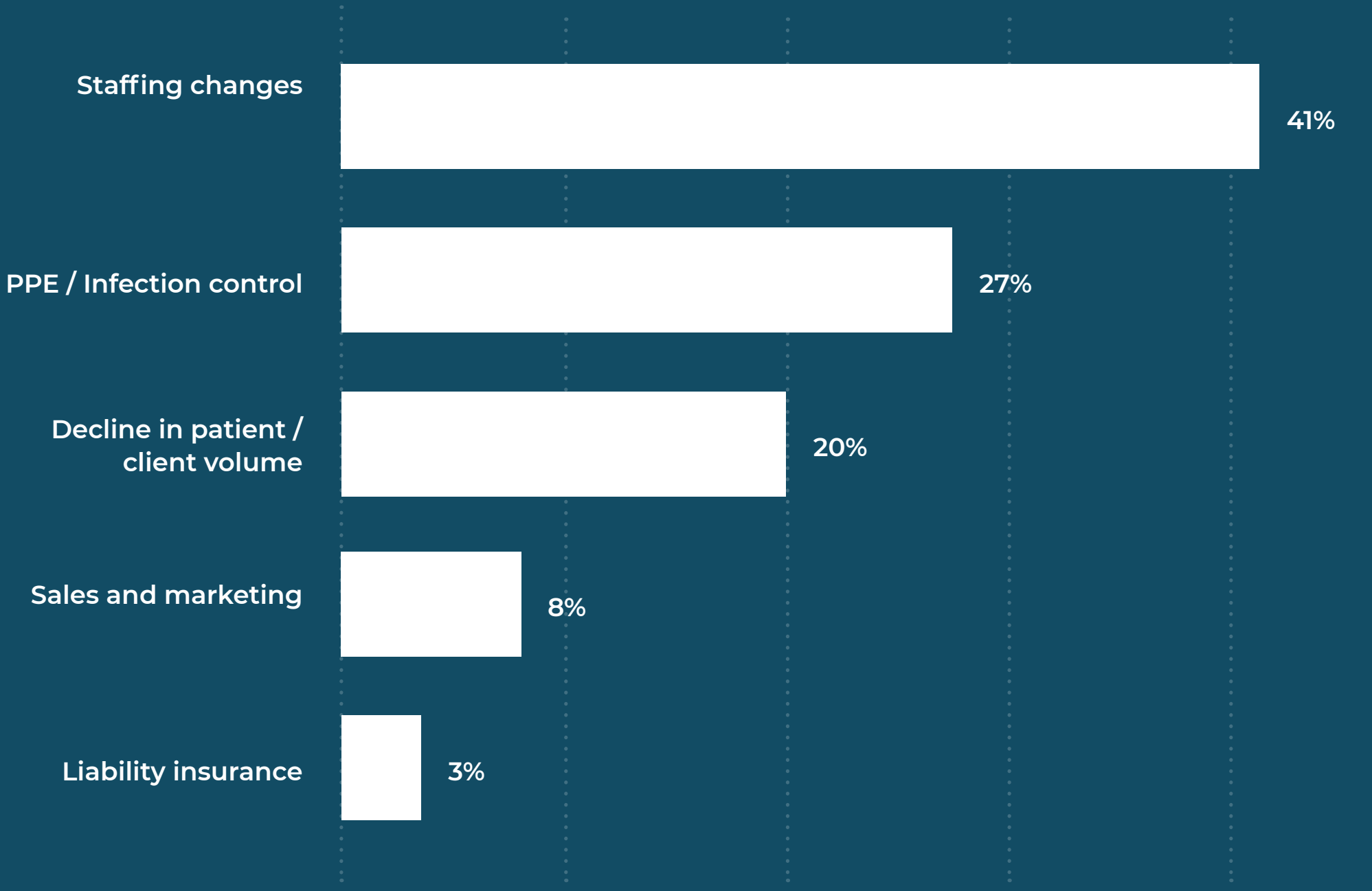
Staffing overtook changing payment models as the greatest non-COVID related concern among respondents looking ahead to 2021.





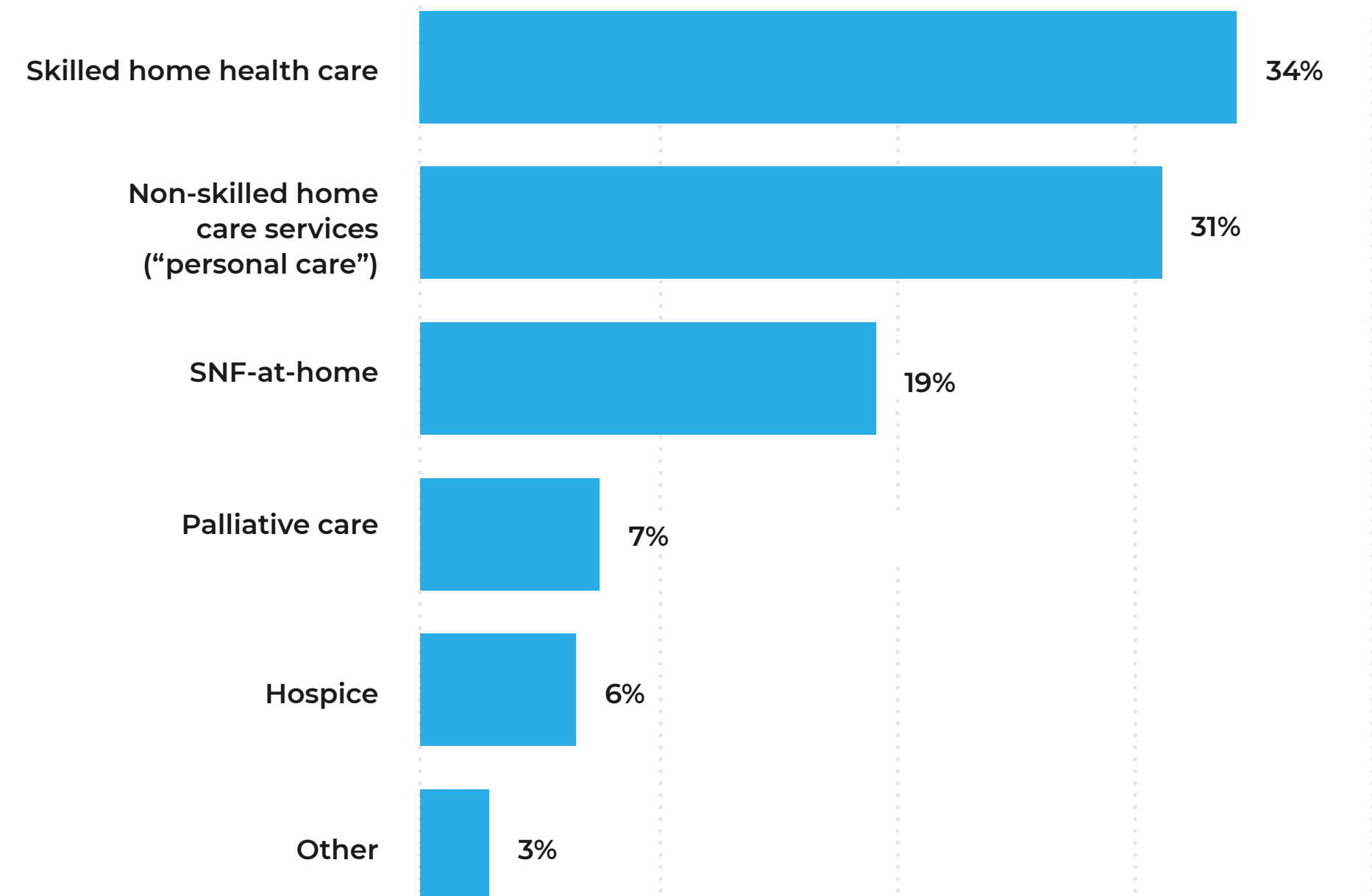
What is the greatest area of expense your organization will face in 2021 relating to COVID-19?

Staffing and PPE are expected to be the greatest COVID-19-related expense categories in 2021 with more than 40% selecting staffing changes as the top area of expense, and more than a quarter citing PPE/infection control as the greatest expected expense area.



What is the greatest growth area for the home-based care industry in 2021?

Skilled home health care and non-skilled home care are anticipated as the top growth areas for 2021 among survey respondents, with SNF-at-home services a close third.



Rank the following from 1–6 in terms of importance in driving technology adoption in 2021

(1=least important 6=most important)

Tech drivers vary widely, from COVID-19 to Medicare Advantage. There was no clear “winner” among respondent rankings of the key drivers of technology adoption, but PDGM, staffing and Medicare Advantage ranked highest relative to the list of drivers presented.



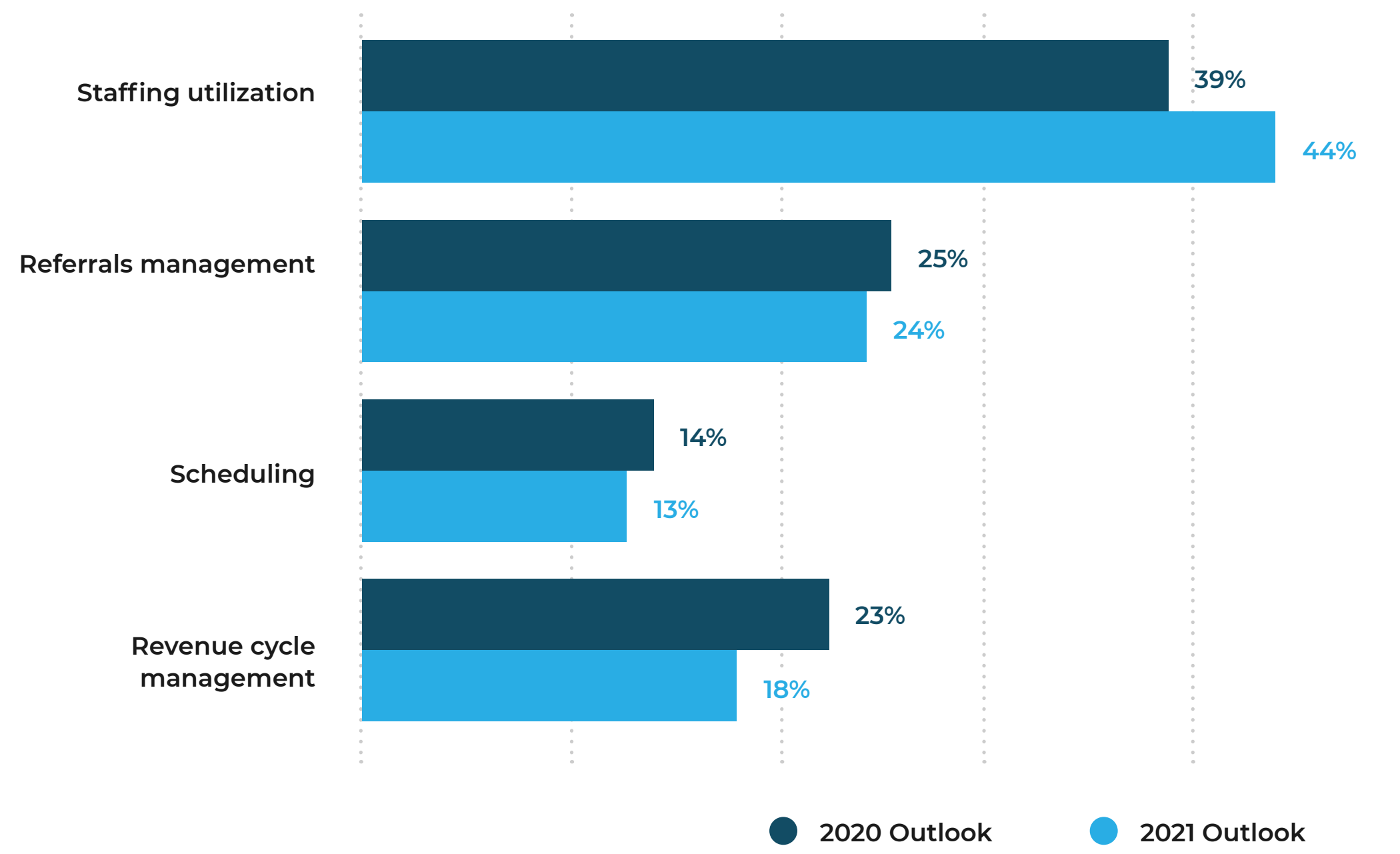
1
least important

3

6
most important

In which of the following areas can your company achieve the greatest business efficiencies in 2021?

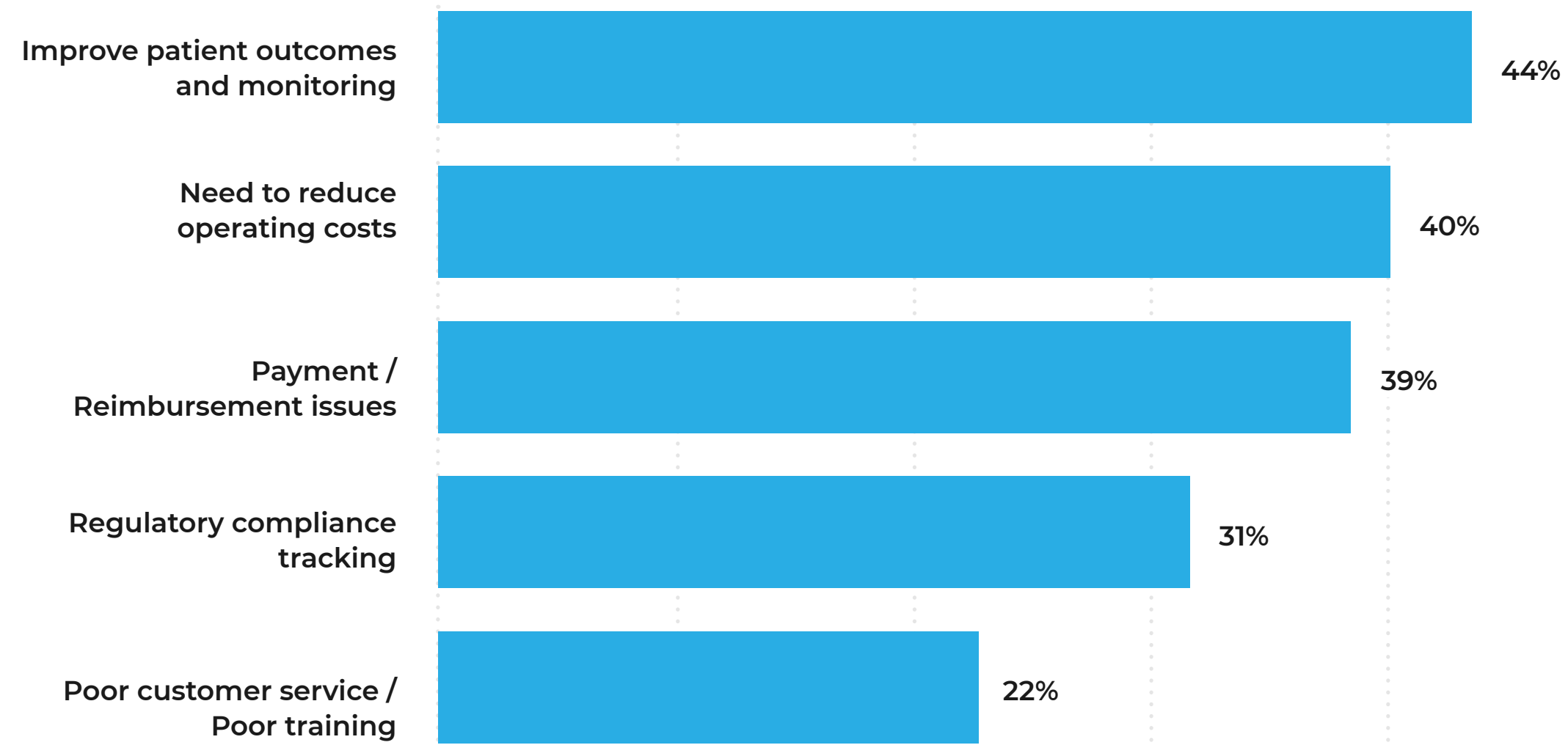
Staffing utilization was the area identified as having the greatest potential for efficiencies in 2021, mirroring last year's survey results, and gaining slightly among respondents this year over last year.



What might prompt you to make a change in the technology platform(s) your organization uses?

(Select all that apply)

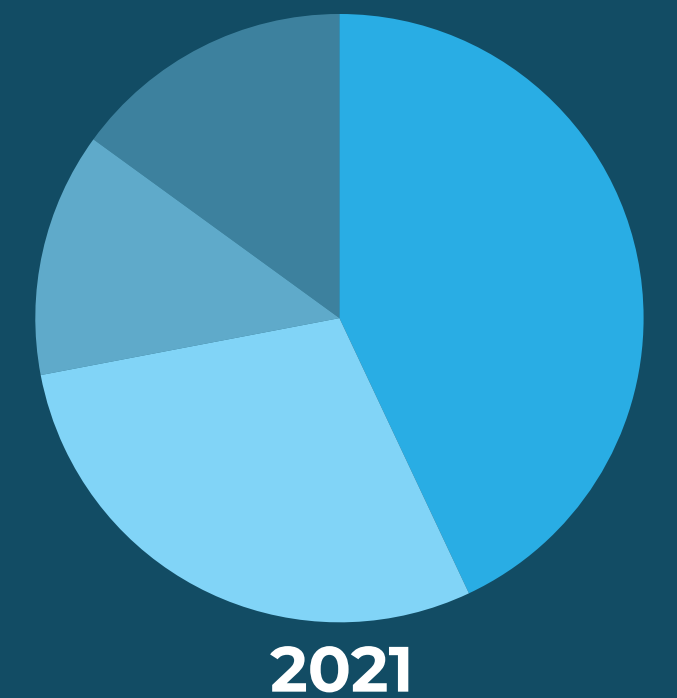
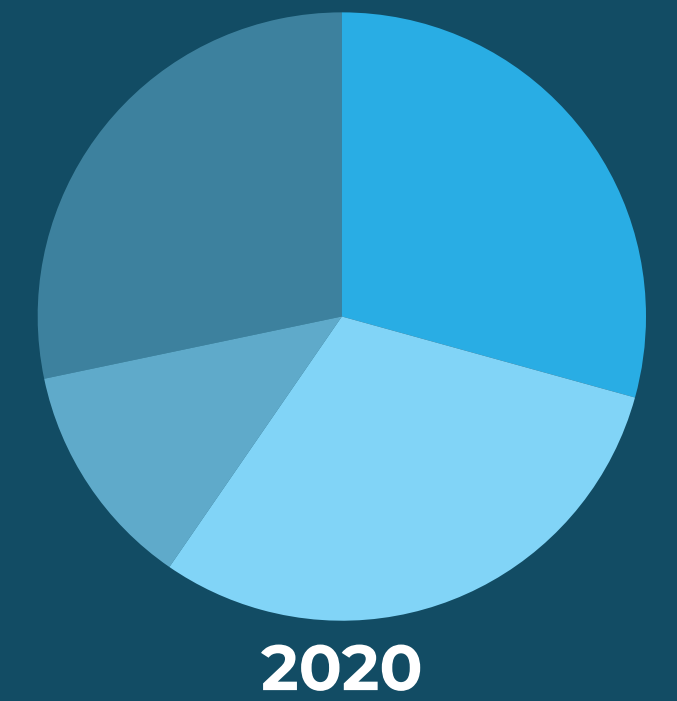
Improving patient outcomes was the most cited reason for prompting a change in technology, followed by the need to reduce operating costs and payment/reimbursement issues.



How great an impact will interoperability — the ability to share data across tech platforms — have on your organization’s growth plans and opportunities in 2021?

Most surveyed agree that interoperability will have a moderate or high impact on their organization’s ability to grow in the coming year with those citing interoperability as having a high impact rising year over year.

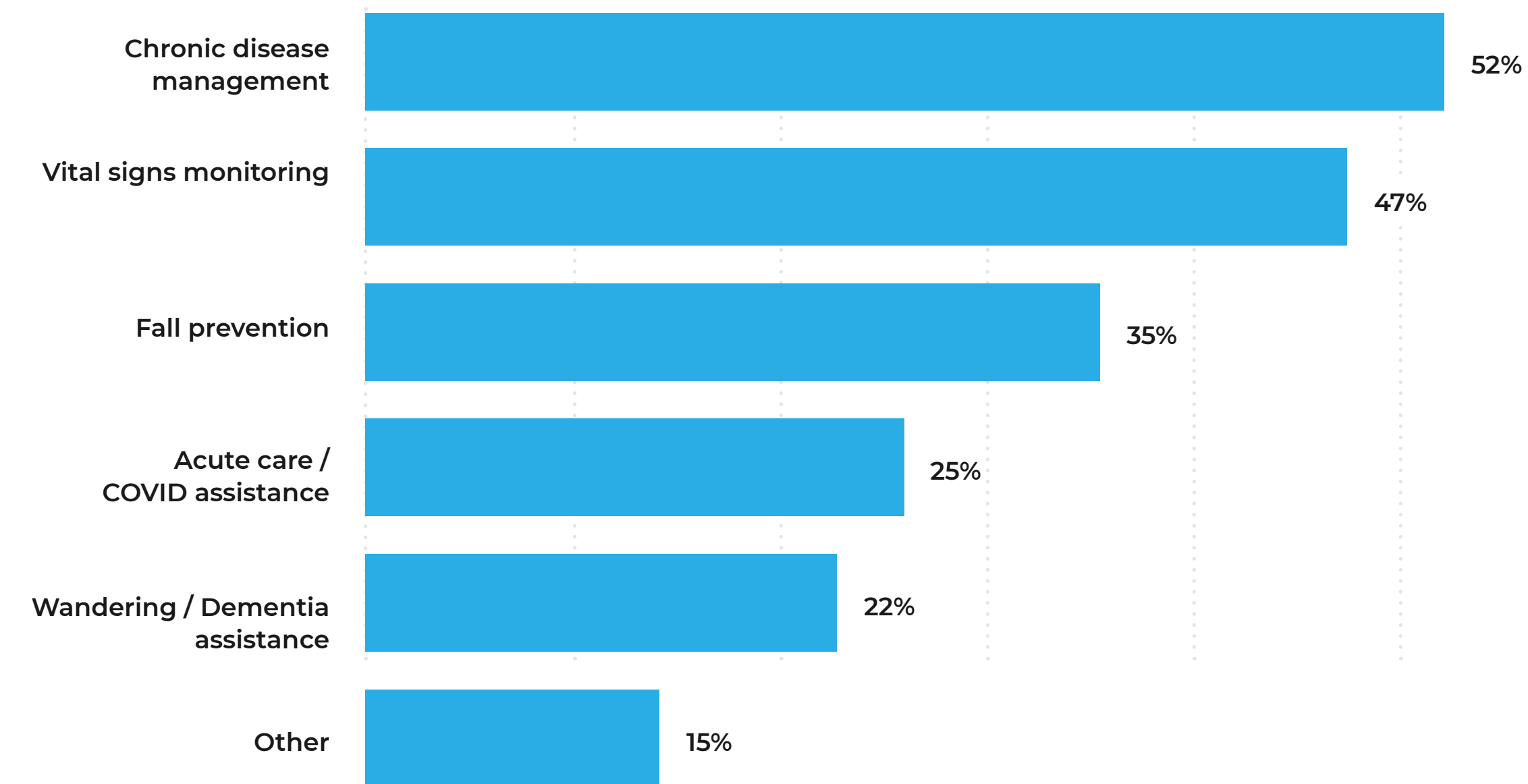
Impact Level	2020	2021
High impact	29%	43%
Moderate impact	30%	29%
Low impact	12%	13%
Don't know	28%	15%



Over the next 12 months, what types of remote-patient monitoring or telehealth technology does your company plan to consider or invest in?

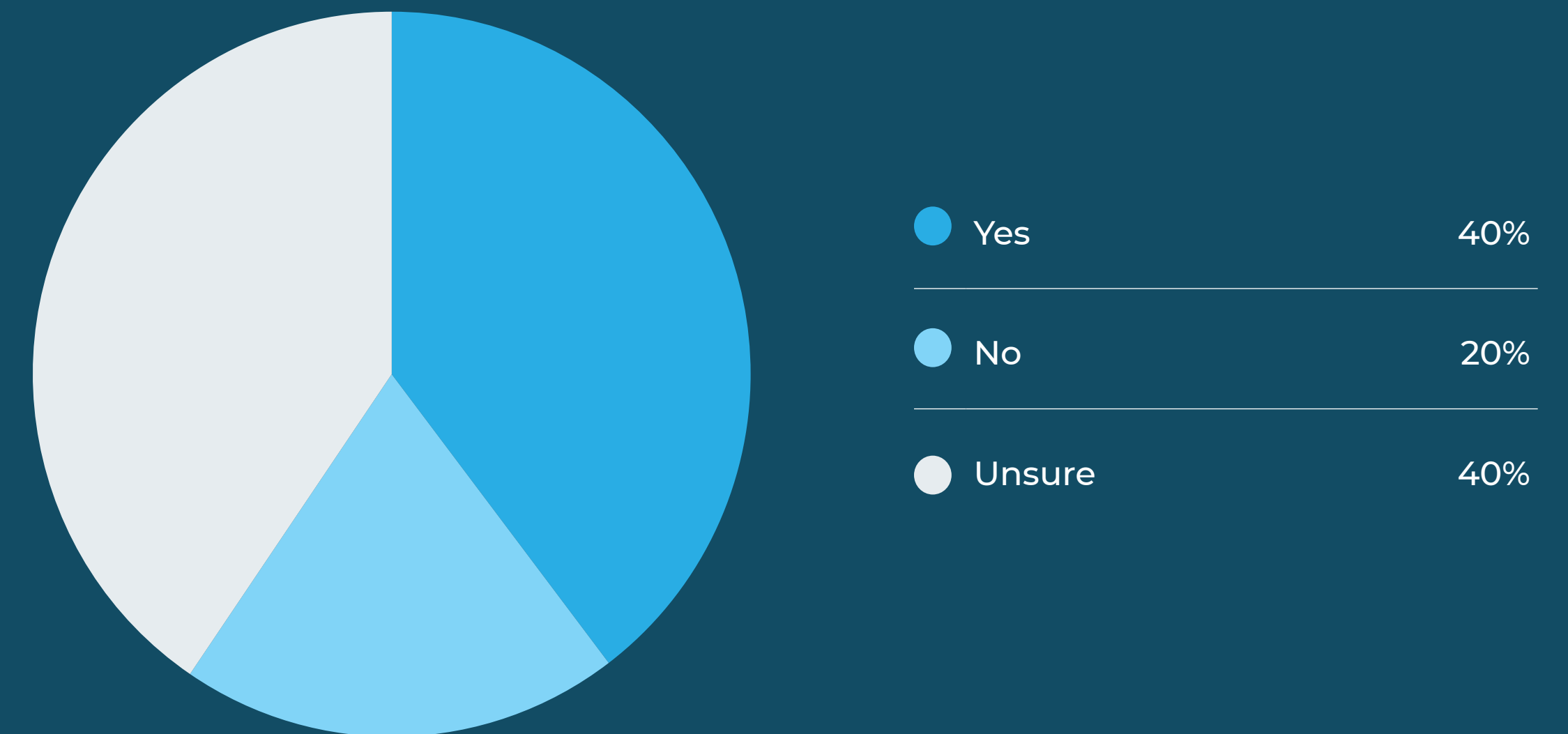
(Select all that apply)

Following a year of widespread telehealth adoption due to the COVID-19 pandemic, chronic disease management and vital signs monitoring topped the list of telehealth and remote-patient-monitoring technologies under consideration for the coming year.



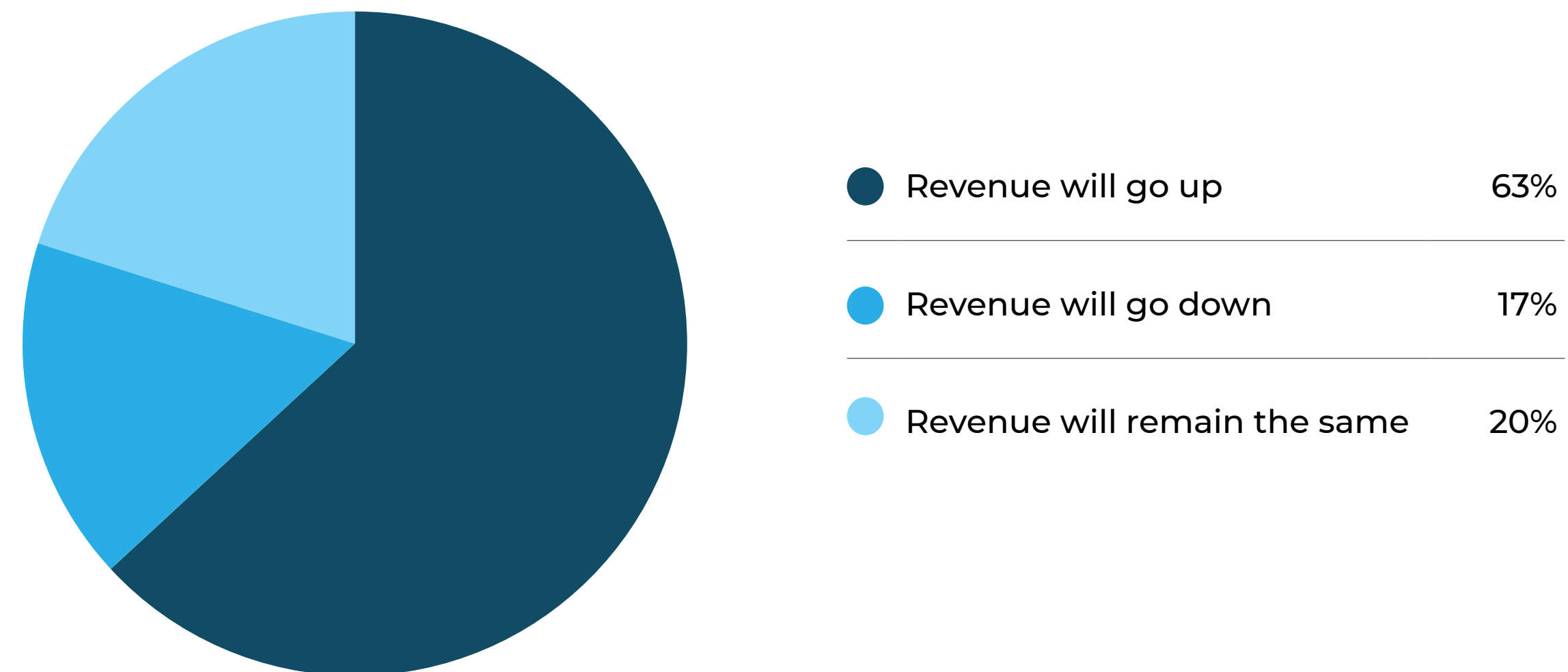
Would you support a nationwide expansion of the Home Health Value-Based Purchasing Model?

Many are unsure about expansion of the Home Health Value-Based Purchasing Model. Initially rolled out as a value-based program in nine states in 2016, roughly 40% of respondents say they are in support of a national expansion of the program, while the same proportion say they are unsure and 20% say they are opposed.



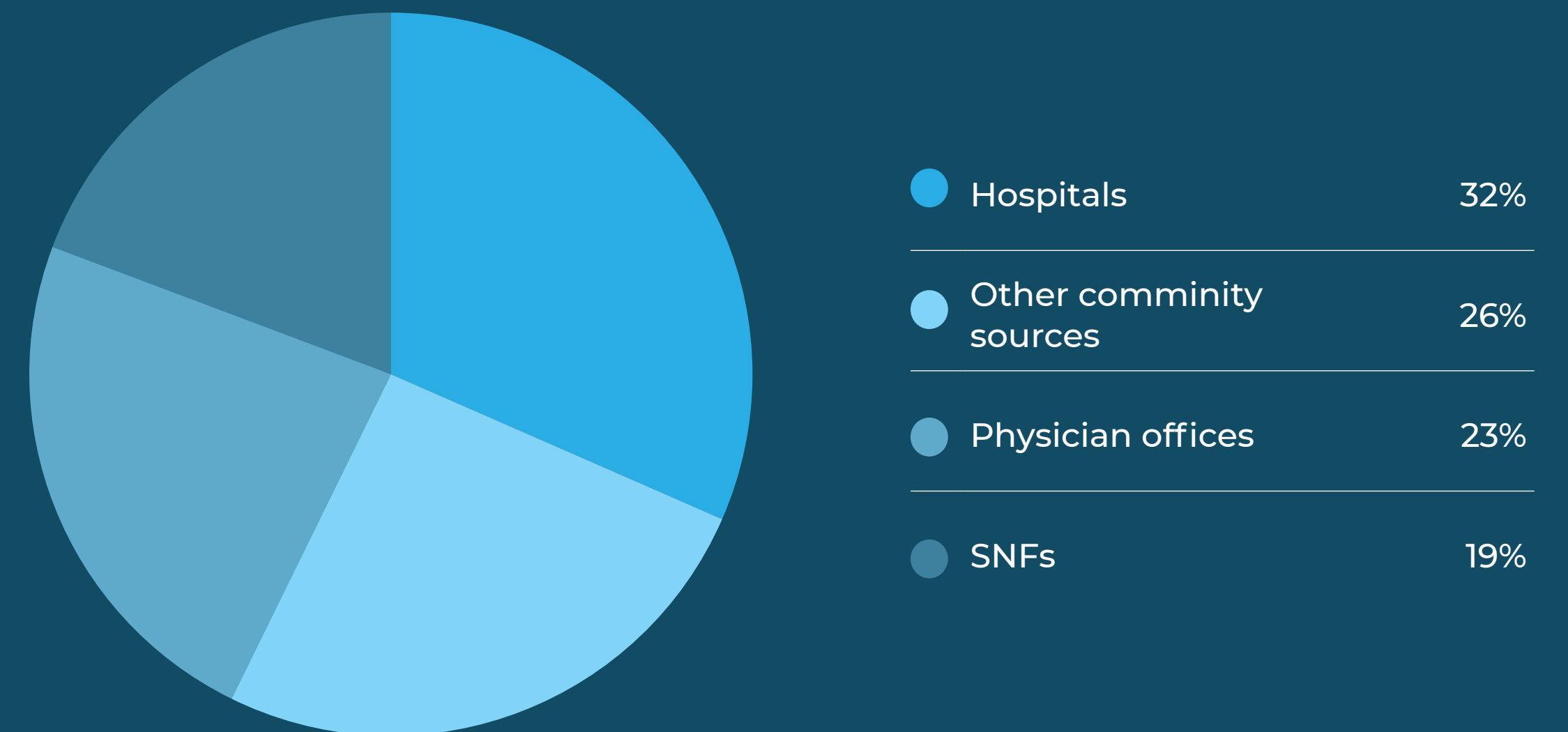
Do you expect your organization's overall revenue to go up or down in 2021 relative to 2020?

Revenue is expected to rise among home health organizations in 2021. Following the devastating pandemic in 2020, more than 60% of respondents say they expect their organization's revenue to rise in the coming year, with fewer than 20% expecting it to fall.



Where do you anticipate growing referrals most in 2021?

Referral growth is most expected from hospitals in 2021, followed by community sources, physician offices and, finally, skilled nursing facilities.



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