2025 CARE AT HOME INDUSTRY TRENDS REPORT

WITH KEYS TO SUCCESS

POWERED BY Ai Axxess intelligence

INTRODUCTION

There is one trend the care at home industry experiences year after year: change. But in 2025, transformations in technology, regulatory complexities, an evolving business landscape and continued operational stress from workforce struggles are creating an environment ripe for the kind of change that comes once in a generation.

Axxess partnered with the Council of State Associations and the Forum of States to survey thousands of home health, hospice, palliative and home care industry professionals about how they are preparing for and dealing with these and other changes.

This report shares insights from the survey and the keys to success that organizations can use to address the major challenges identified.

At the core of this report's insights is Axxess Intelligence™, our platform that combines advanced AI with human expertise to address the unique challenges and opportunities in the care at home industry.

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KEY SECTIONS

TECHNOLOGY TRENDS

Technology is reshaping care at home like never before, with advancements paving the way for transformative care delivery. Among these, artificial intelligence (AI) stands out as a key opportunity to address persistent operational challenges. However, many organizations express uncertainty about effectively integrating AI into their workflows and patient care.

Top Emerging Technologies
Predicted to Impact Care Delivery by 2030:

Artificial Intelligence	**60%**
Blockchain and Secure Health Data	**31%**
Predictive Analytics	**29%**
Internet of Things (IoT) for Patient Monitoring	**27%**
Robotics and Automation	**22%**
Virtual Reality for Patient Therapy	**22%**

Artificial intelligence topped the list of emerging technologies that providers feel will change the way healthcare is delivered by 2030, followed by blockchain and secure health data as well as predictive analytics.

60%   31%   29%   27%   22%   22%
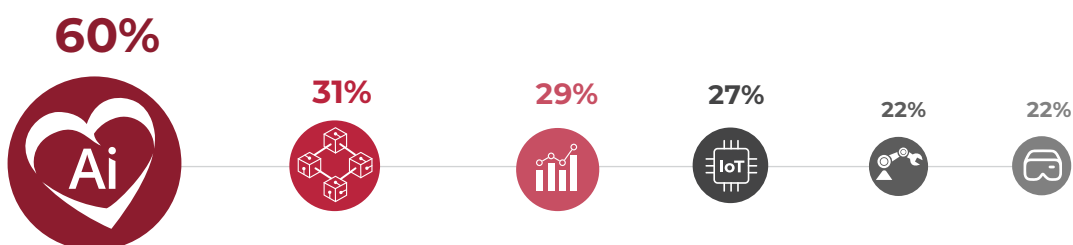
What technology investments are you prioritizing in 2025?

Staff training and engagement tools	**53%**
Care coordination and EHR systems	**47%**
Patient engagement platforms	**31%**
Remote patient monitoring, telehealth, and diagnostics	**29%**
Predictive analytics and data management	**27%**
AI and automation in care delivery	**24%**

While AI holds the most potential in the eyes of providers, it's not the immediate priority for them heading into 2025. AI-specific technology investment ranked last when respondents were asked about their overall technology spending.
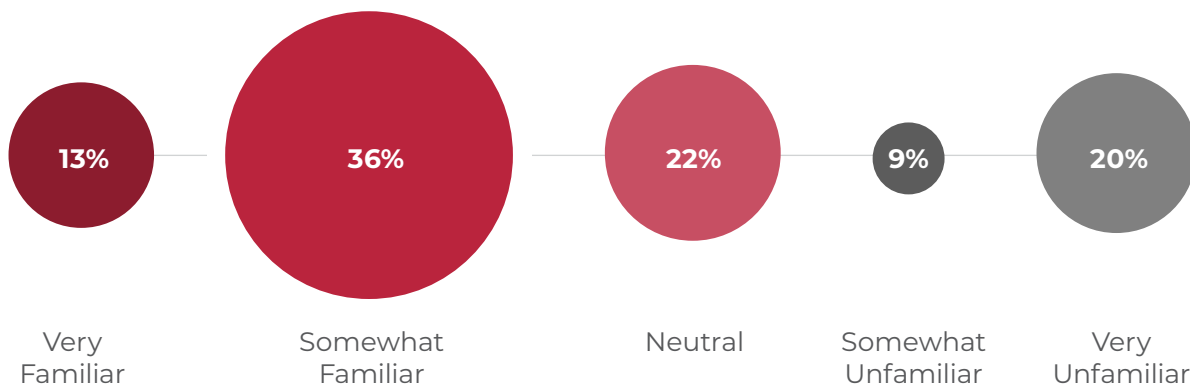
53% **47%** **31%** **29%** **27%** **24%**
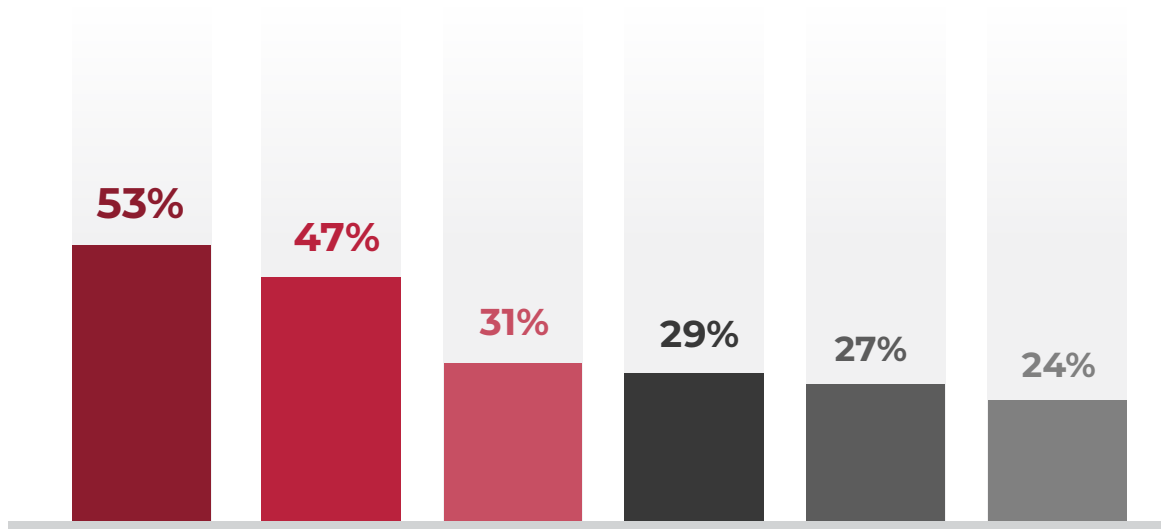
TECHNOLOGY TRENDS

How familiar are you with **AI applications** in the care at home industry?

Very Familiar	**13%**
Somewhat Familiar	**36%**
Neutral	**22%**
Somewhat Unfamiliar	**9%**
Very Unfamiliar	**20%**

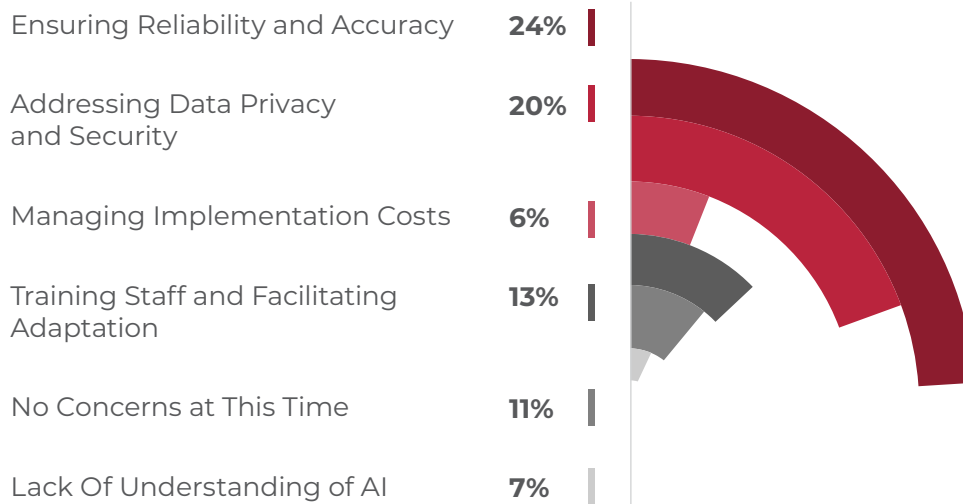The reluctance to invest in AI systems likely stems from the unfamiliarity surrounding the technology and sorting through the hype to connect it to the work of patient care.

In fact, nearly half of respondents were not familiar with AI applications in care delivery.

13%	36%	22%	9%	20%
Very Familiar	Somewhat Familiar	Neutral	Somewhat Unfamiliar	Very Unfamiliar

What is your main concern about integrating AI into your operations?

Concern	%
Ensuring Reliability and Accuracy	**24%**
Addressing Data Privacy and Security	**20%**
Managing Implementation Costs	**6%**
Training Staff and Facilitating Adaptation	**13%**
No Concerns at This Time	**11%**
Lack Of Understanding of AI	**7%**

And concerns linger about the state of AI today and whether it can be trusted to be accurate and secure.

Keys to Success: Merging Artificial Intelligence With Human Intelligence

Initiate conversations with your EMR providers to express your interest in enhanced interoperability and AI capabilities for your systems. By fostering this dialogue early on, you can stay informed about upcoming developments and position your organization to leverage AI-driven solutions when they become available.

Consider creating an **innovation subcommittee** that will assess current technology and gaps. This team can evaluate platforms that align with your organization's goals, ensuring thoughtful, strategic technology adoption while empowering your staff with upskilling and leadership opportunities.

When evaluating your technology needs, prioritize systems that enhance interoperability, efficiency and care quality.

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TECHNOLOGY PRIORITIES TO CONSIDER

1. Systems to Enhance Interoperability, Efficiency, and Care Quality

- Integrated Communication and Documentation Systems
- EHR Systems
- Digital Document Management
- Order Management

These tools enable secure, seamless communication across service lines and streamline workflows, reducing administrative burdens and ensuring coordinated, patient-centered care.
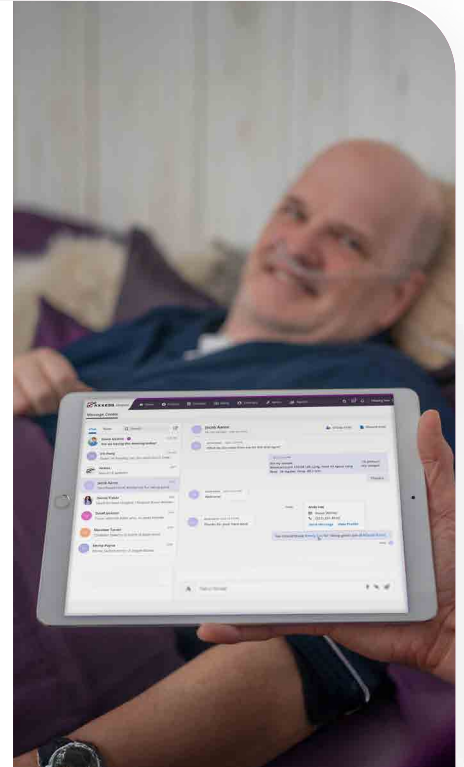
2. Clinical Intelligence and Decision Support

- Clinical Efficiency AI Tools
- Data and Business Analytics Tools
- Predictive Analytics Systems

Leverage real-time insights and actionable data to optimize care delivery and enhance both operational and clinical outcomes.
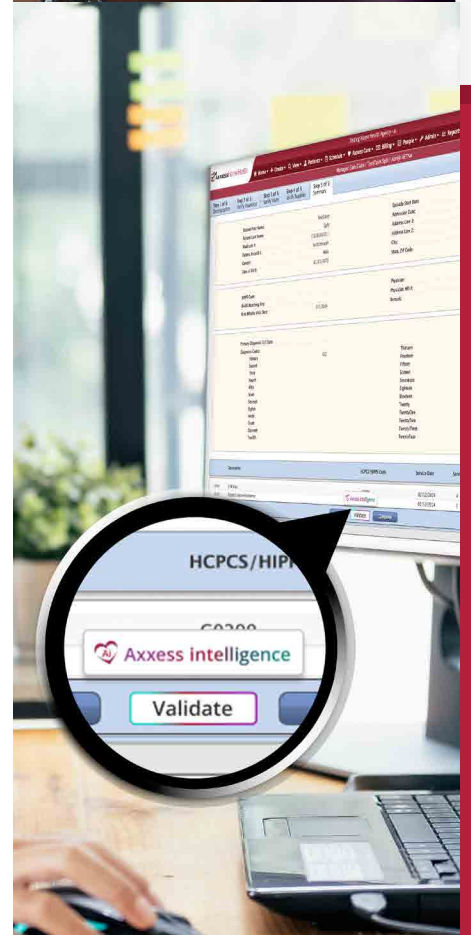
3. Financial and Administrative Efficiency

- Revenue Cycle Management Solutions
- Accounting and Payroll Software
- Market Intelligence and CRM Tools

Simplify administrative processes, improve cash flow, enhance compliance, and strengthen patient engagement for a more efficient operation.

4. Talent Development and Engagement

- Talent Platforms
- Learning Management Systems (LMSs)

Recruit, retain and engage staff effectively. Scalable training, targeted onboarding and professional development tools empower your workforce with leadership and upskilling opportunities.

By leveraging technology that embraces AI and provides a spiderweb of interoperability, the care at home industry can provide higher quality, more efficient, and patient-centered care, ultimately improving outcomes for patients and their families.
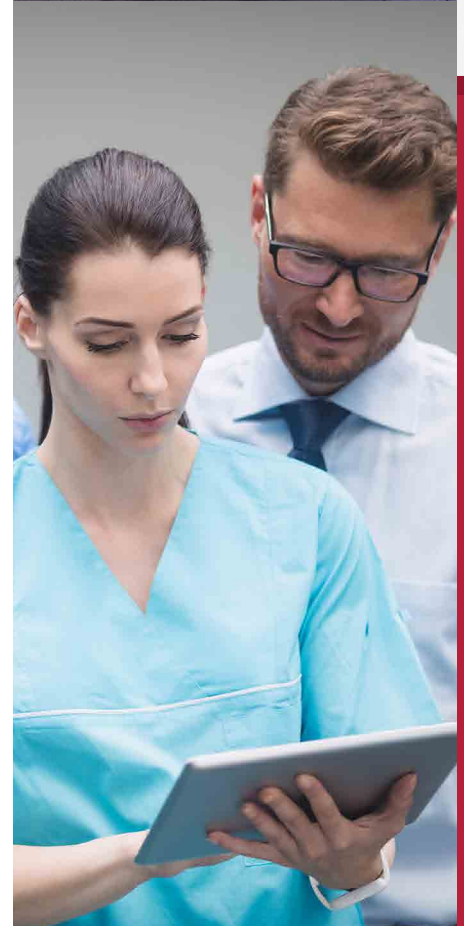
TECHNOLOGY PRIORITIES FOR 2025

In 2025, providers will prioritize investments that enhance staff retention and increase operational efficiency. **Engagement tools** lead the list of priorities, followed by **care coordination** and **EHR platforms**, such as Axxess. With regulatory changes affecting patient satisfaction surveys for hospice and home health providers, the industry is also focusing on **patient engagement technologies** to improve care experiences and outcomes.

Top 3 Investments for 2025

#1

Staff Training and
Engagement Tools

#2

Care Coordination
and EHR Systems

#3

Patient Engagement
Platforms

Keys to Success: Develop a Culture of Innovation

Bridging the gap from your current technological state to a desired future state begins with cultivating a **culture of innovation**. This means fostering a collective mindset, shared values, and practical beliefs that actively support and drive innovation.

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In such an environment:

- Creativity, experimentation, and new ideas are **encouraged and embraced**.
- Employees feel confident sharing their ideas and solutions, knowing their input is valued.
- Team members actively participate in brainstorming and collaborative problem-solving sessions.

A culture of innovation also promotes **calculated risk-taking**. Employees are willing to explore new and innovative approaches, understanding that innovation often requires experimentation, even if it involves occasional failures.

Leadership plays a pivotal role in fostering innovation by:

- Setting a clear tone and vision.
- Allocating the necessary resources.
- Actively engaging in innovation-driven initiatives.

This leadership approach helps break down silos and promotes collaboration across departments.

While many industries are adopting AI, a report published by McKinsey showed that **72% of companies are implementing the technology**, the home health and hospice sector risks falling behind.

Interoperable systems are key to integrating new technologies and innovative care models. **These systems empower home care agencies to**:

- Stay at the forefront of healthcare advancements.
- Deliver higher-quality, more efficient, and patient-centered care.

By embracing interoperability and fostering a culture of innovation, the care-at-home industry can significantly improve outcomes for patients and their families.

WORKFORCE TRENDS

The care at home industry has long struggled with staffing challenges and remains in constant pursuit of innovative solutions. In 2025, this trend is expected to persist as more providers acknowledge that technology may offer a breakthrough to what has seemed like an unsolvable problem. Recruiting more professionals is a top priority for the care at home industry, but providers also recognize the critical need to retain their current staff to sustain operations in today's demanding business environment.

How are you addressing staff shortages?

Implementing Flexible Scheduling	**44%**
Offering Incentives or Bonuses	**35%**
Contracting Temporary Staff	**31%**
Adopting Technology-Driven	**20%**

44%

35%

31%

20%
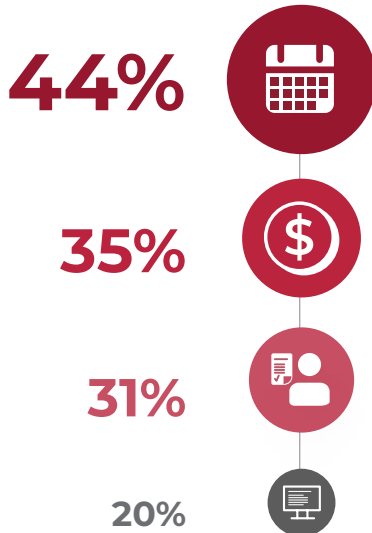
Leveraging automation and technologies like AI to enhance speed to productivity is becoming increasingly crucial. Persistent staffing challenges remain the top issue for providers heading into 2025. To address recruitment and retention dilemmas, providers are seeking streamlined solutions for training and upskilling their workforce.

What are the **biggest workforce challenges** your organization faces in 2025?

Recruitment and Retention	**62%**
Training and Upskilling Needs	**45%**
Balancing Field and Office Workforce Needs	**25%**
Adopting New Technologies	**25%**
Addressing Burnout and Mental Health	**27%**
Managing Remote or Hybrid Work Arrangements	**16%**

To address the staffing shortages that have plagued providers, the industry is increasing recruitment efforts and leveraging technology in new ways. **The top technology trend in 2025 is that 53% of providers said they are prioritizing technology investments that engage and help train staff.** Technology is emerging as a critical enabler to mitigate staffing pressures and maintain operational efficiency.

62%
45%
25%
25%
27%
16%
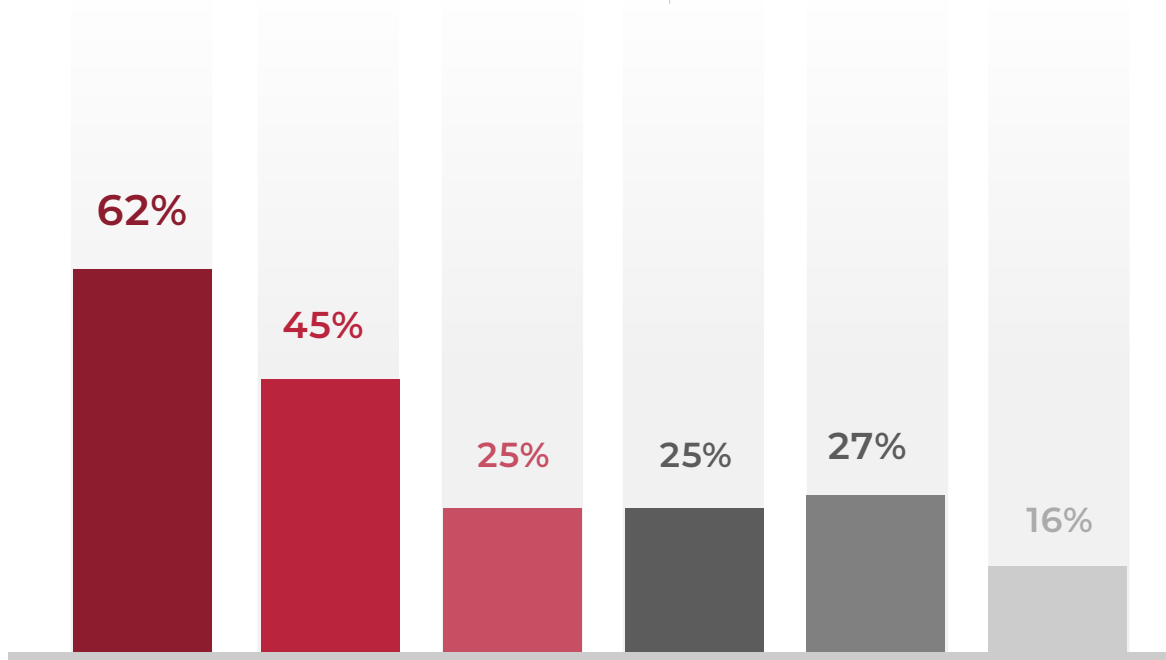
WORKFORCE TRENDS

What are some key ways technology is helping your organization?

Automating Administrative Tasks	**45%**
Providing Digital Training and Onboarding	**42%**
Enhanced Communication Tools	**42%**
Generating Predictive Analytics	**24%**
Not Providing Support At This Time	**24%**
Enabling Telemedicine and Remote Monitoring	**22%**

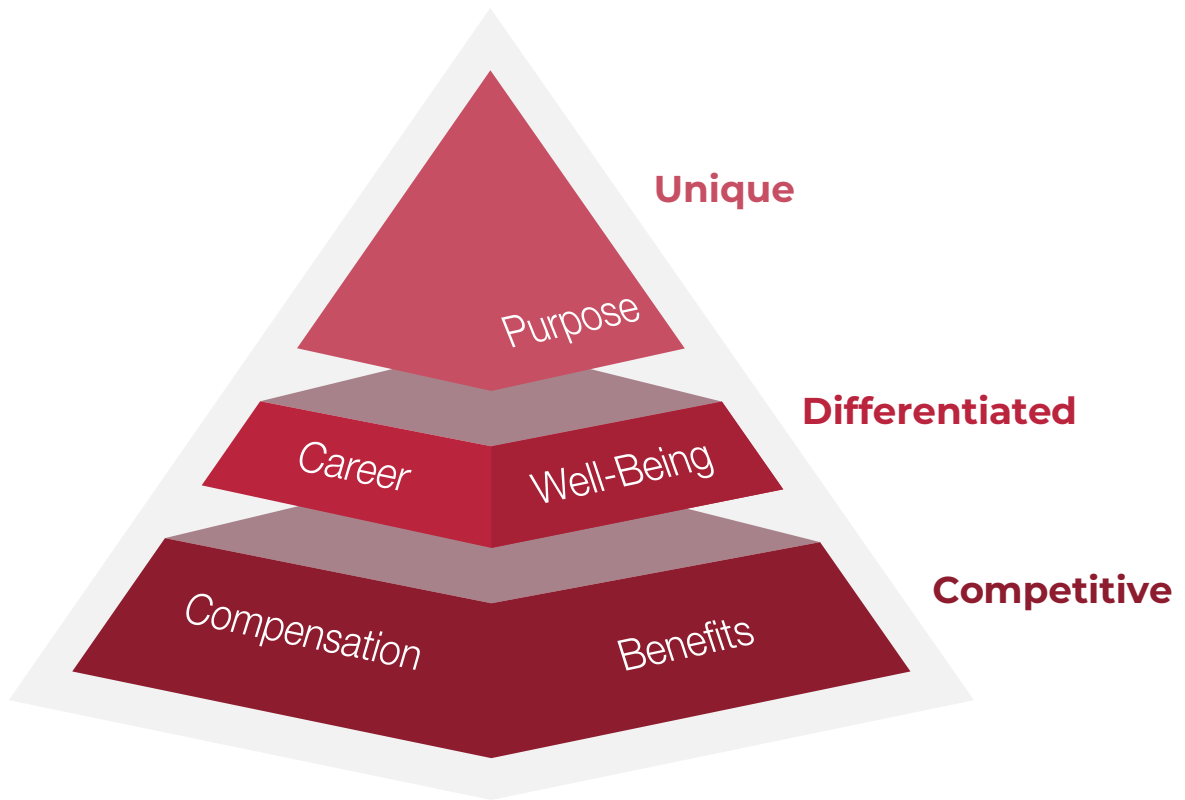**Keys to Success: Attract and Retain Top Talent**

Providing **employee value propositions** during the recruitment process will provide insight into your investment in each employee and the access they will have for re-skilling and upskilling opportunities. Your Employee Value Proposition forms the core of your employer brand, defining what employees will gain from working with you.

Employee Value Propositions explain the **unique experiences, rewards, and benefits** that an organization offers to its employees **in exchange for their effort, skills, and commitment**. It's a promise of what employees can expect to gain from working for the organization, beyond just their salary or benefits package.

Today's workforce isn't uniform – we have five generations working together, each bringing a unique work style. It's essential to implement different strategies and ideas to meet these unique needs.

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Employee Value Propositions

Unique

Purpose

Differentiated

Career   Well-Being

Competitive

Compensation   Benefits

EMOTIONAL
Company values,
Sense of purpose

EXPERIENTAL
Work-life Balance,
Carer Development

CONTRACTUAL
Competitive, Autonomy
Empowerment

RESPONDING TO REGULATORY TRENDS

Care at home providers looking to thrive must stay on top of the latest regulatory changes across the industry. While efforts to mitigate financial cuts and increased audit scrutiny are ongoing at both state and national levels, uncertainty about the future remains. Many respondents identified technology as a critical tool to address and manage the challenges posed by these anxiety-inducing regulatory changes.

What three regulatory or policy changes concern your organization the most?

Reimbursement Changes (E.G., CMS and Payers)	**82%**
Compliance And Audit Requirements	**59%**
Quality-of-care Reporting Mandates (E.G., HOPE, VBP, RCD)	**57%**
Data Privacy and Security Regulations	**41%**
New Staffing and Labor Regulations	**41%**
Cost Reporting Requirements	**11%**

The uncertainty swirling in the industry is likely because many providers do not feel prepared for what's coming. **Only 40% of respondents reported they were even somewhat prepared for the coming changes**. This gap could delay efforts to maintain compliance and grow business if it is not addressed.

82% **59%** **57%** **41%** **41%** 11%
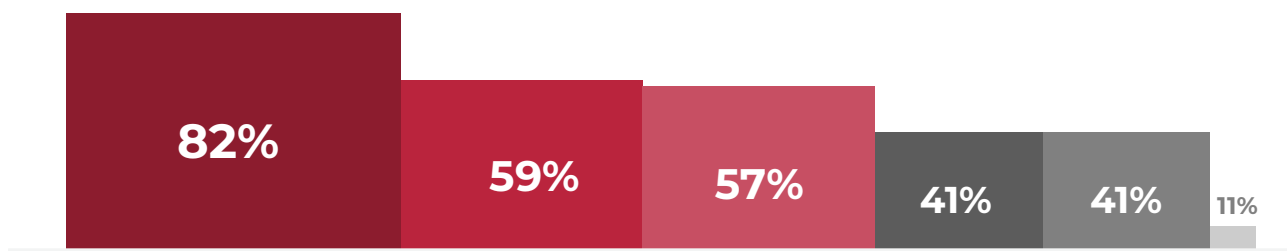
How would you rate your organization's preparedness for upcoming regulatory changes?

Not At All Prepared	**14%**
Somewhat Unprepared	**16%**
Neutral/Unsure	**30%**
Somewhat Prepared	**20%**
Very Prepared	**20%**

One way to account for the human factor in compliance is with training systems that reinforce quality standards throughout an organization.

13%	16%	30%	20%	20%
Not At All Prepared	Somewhat Unprepared	Neutral/Unsure	Somewhat Prepared	Very Prepared
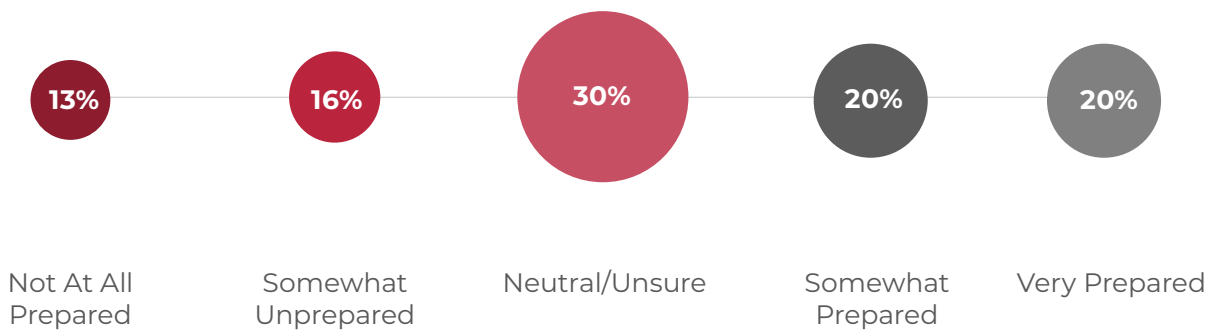
RESPONDING TO REGULATORY TRENDS

In what ways do you see a Learning Management System benefiting your organization?

Improving training quality and compliance	**60%**
Enhancing employee training and competencies	**51%**
Reducing administrative workload	**51%**
Increasing employee engagement	**40%**
Attracting top talent	**18%**

When asked how a learning management system could benefit their organization, providers overwhelmingly said it could be a game-changer for their operations by reinforcing compliance and efficiently training staff.

60%   **51%**   **51%**   40%   18%

The ABCs of an LMS

Attitude

Behavior

Confidence

Competencies

Keys to Success: Adapting to Industry Challenges

Navigating the complexities of regulatory and policy changes is crucial for growth in the healthcare industry. Below are six practical tips to help your organization adapt and thrive. By implementing these practical tips, your organization can better navigate regulatory challenges and position itself for sustainable growth.

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AXXESS TRAINING AND CERTIFICATION

In today's competitive healthcare landscape, managing your workforce effectively is crucial for success. An LMS solution, like Axxess Training and Certification, is designed to build competencies, providing your employees with the confidence they need to execute their job with the highest level of quality. When employees feel empowered to perform at the top of their license or skill set, that positively impacts their attitude. Patients and families notice this attitude, which can impact outcomes. And improved outcomes are critical to scaling a business for growth.

- **55%** of home health and hospice staff feel completely prepared to take care of a new client
- On average new hire receives five hours of orientation
- On average employees receive eight hours of ongoing training
- **40%** of younger leaders described their organizations learning and development programs as excellent
- **39%** of providers have an established training program to retain long-term employees
- **44%** struggle with upskilling employees

SOURCE: 2024 HOME CARE PULSE ACTIVATED INSIGHTS BENCHMARKING REPORT

RESPONDING TO REGULATORY TRENDS

Practical Tips

1. **Stay Informed and Proactive with Advocacy Efforts**

   Monitor Regulatory Changes:
   - Regularly track updates from regulatory bodies such as CMS and other payers.
   - Subscribe to industry newsletters and attend relevant webinars to stay informed.

   Engage with Industry Groups:
   - Join professional associations and advocacy groups to gain insights and participate in policy discussions.
   - Follow relevant government agencies and industry leaders on social media for real-time updates and immediate insights into regulatory developments.

   Advocate for Supportive Policies:
   - Actively participate in advocacy efforts to influence policies that ensure financial stability for healthcare organizations.
   - Use strategic frameworks to prepare for and respond to legislative changes, fostering resilience and stakeholder engagement.

   Build Relationships with Policymakers:
   - Establish connections with local and national policymakers to stay informed about upcoming legislative changes.
   - Share your concerns and suggestions to help shape policies that benefit the care-at-home industry.

2. **Leverage Technology for Compliance by Enhancing Data Privacy**

   Partner with Technology for Compliance Management:
   - Work with platforms that include built-in controls to streamline and strengthen compliance efforts.

   Use Data Analytics for Strategic Insights:
   - Assess the impact of legislative changes on your business performance using data analytics.
   - Analyze trends to make informed decisions and adapt strategies effectively.

   Implement Robust Security Measures:
   - Invest in advanced cybersecurity solutions to safeguard patient data.
   - Regularly update systems and conduct security audits to mitigate risks.

   Train Employees on Data Privacy Best Practices:
   - Provide comprehensive training on data privacy regulations to prevent breaches and ensure compliance.

3. Optimize Staffing and Compliance

Adopt Flexible Staffing Models:

- Leverage technology to manage staffing efficiently and ensure compliance with labor regulations.
- Explore telehealth and remote work options to increase flexibility and address workforce needs.

Develop Comprehensive Compliance Programs:

- Implement regular training sessions and compliance audits to identify and mitigate risks.
- Keep programs updated to align with evolving regulatory requirements.

4. Improve Quality-of-Care and Mandatory Reporting

Streamline Quality-of-Care Reporting:

- Use EHR systems and digital tools to automate data collection and reporting, minimizing manual errors.

Foster a Culture of Continuous Improvement:

- Regularly review and analyze quality metrics to identify and address areas for enhancement.

Evaluate Cost Reporting Practices:

- Review your annual cost reporting process and consider partnering with consulting services to ensure accuracy and compliance.

5. Prepare for Reimbursement Changes

Explore Alternative Payment Models:

- Diversify revenue streams to reduce dependency on single reimbursement sources.
- Develop a long-term financial plan to account for potential regulatory changes and maintain financial health.

Conduct Financial Planning and Analysis:

- Perform scenario analyses to assess the potential impact of reimbursement rate changes.
- Work with financial experts to create strategies that promote stability and sustainability.

6. Assessing Preparedness

Self-Assessments or Surveys

- To gauge your organization's readiness for upcoming regulatory changes, consider conducting a self-assessment or survey among your leadership team.

| Not At All Prepared | Somewhat Unprepared | Neutral/Unsure | Somewhat Prepared | Very Prepared |

FUTURE INVESTMENT TRENDS

While there are challenges, uncertainties and new advancements happening across the care at home industry, not everything is doom and gloom. Providers have indicated that they are looking toward the future with an eye for scaling their services, overcoming the barriers to growth and adopting technology to better serve patients and run their operations.

What three primary barriers to growth does your organization face?

Barrier	%
Reimbursement rates and payment models	65%
Staffing shortages	56%
Local market competition	48%
Regulatory and compliance requirements	46%
Technology and system integration challenges	44%
Limited access to capital for expansion	33%

When it comes to how they plan to grow beyond 2025, providers plan to focus on partnerships, expanding services, and adjusting to the value-based payment models. The fact that mergers and acquisitions was the least chosen response suggests that providers may be looking inward to their own operations rather than growth through integration.

65% **56%** **48%** **46%** **44%** **33%**
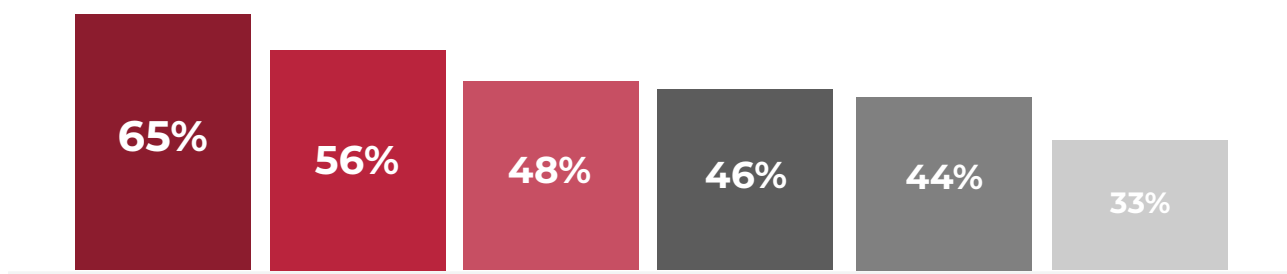
What growth investments are you planning to make in the next 3-5 years?

Building Strategic Partnerships and Collaborations	**44%**
Expanding Existing Service Lines (e.g., Behavioral Health, Palliative Care)	**35%**
Adjusting To Value-based Care and New Payment Models	**35%**
Expanding Into New Geographic Markets	**29%**
Developing Home-based Virtual Care Models	**27%**
Launching New Service Lines (e.g., Behavioral Health, Palliative Care)	**25%**
Leveraging Data and Analytics	**17%**
Pursuing Mergers and Acquisitions	**18%**

As for how the industry wants to innovate in the future, the focus is on patient-centered care improvements and new technologies that will streamline operations.

44% **35%** **35%** **29%** **27%** **25%** **17%** **18%**
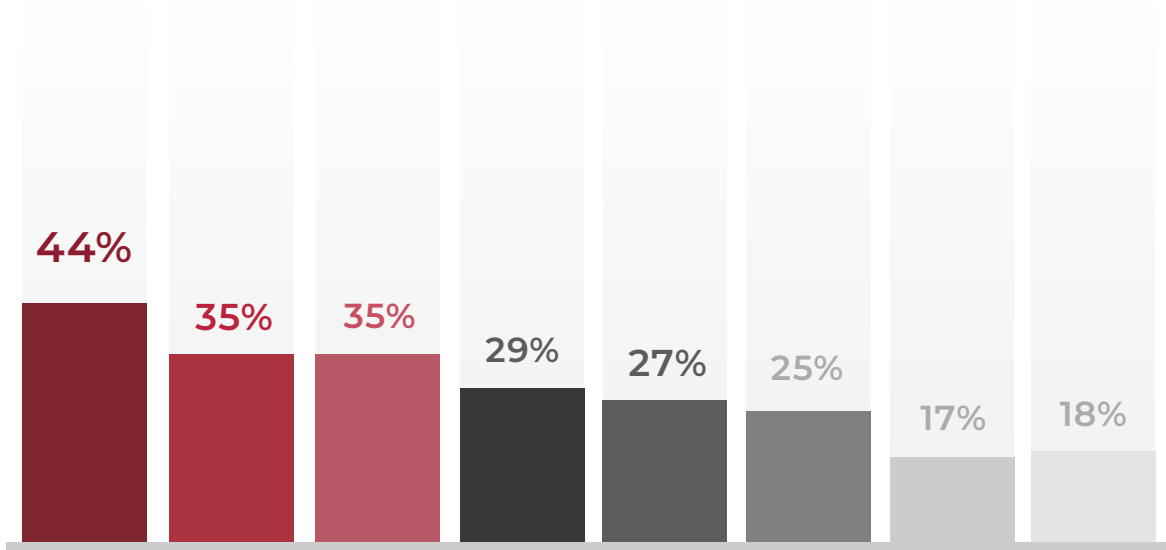
FUTURE INVESTMENT TRENDS

Which top three areas have the highest potential for innovation and improved outcomes?

Advancing Chronic Disease Management	**80%**
Integrating Behavioral Health Care	**51%**
Expanding Remote Monitoring and Telehealth	**49%**
Collaborating On Community-Based Care	**41%**
Developing Personalized Care Plans with AI	**39%**
Innovating End-Of-Life Care Models	**37%**

Bringing the future to life requires successful execution of change management principles, particularly in the evolving care at home industry. Providers note that they face internal and external obstacles to change that make the adjustment much harder with just **30%** acknowledging their organization proactively explores new and innovative ideas.

How often does your organization explore and adopt new care models or services?

Rarely/Never	**20%**
Occasionally	**27%**
When A Clear Need Arises	**24%**
Proactively	**10%**
Continuously	**20%**

Change management in the care at home industry faces several unique challenges.

Complex Regulatory Environment	**61%**		Workforce Dynamics	**44%**
Resistance To Change	**51%**		Patient-Centered Focus	**29%**
Resource Constraints	**49%**		Consumer Awareness	**29%**
Technology Adoption	**49%**		Cultural Barriers	**24%**

Keys to Success: The Importance of Adopting Innovative Technology

Adopting innovative technology is crucial for the growth and improvement of patient care in the home care industry. While the rising patient and caregiver expectations around care satisfaction are increasing as we struggle to do more with less, advances in technology have offered some relief in caring for patients. Technology is transforming care at home by enabling remote patient monitoring, telemedicine, and the use of wearable devices. These innovations give providers instant access to patient data, enabling quick decision-making.

Tech-enabled support can assist us in improving patient care capabilities while streamlining operations as the industry prepares for the future. Future advances in care at home technologies can augment and facilitate care at home within the healthcare system and help foster community-based independence for people. Technology creates vital links to facilitate communication, coordination and improved collaboration.

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FUTURE INVESTMENT TRENDS

Below are six practical tips to highlight its importance and drive growth:

1. Enhance Patient Monitoring and Safety
- Implement remote patient monitoring (RPM) systems to continuously monitor patients' health conditions from their homes. This technology enables early detection of potential health issues, reducing hospital readmissions and improving patient outcomes.
- Use wearable technology like smartwatches and health monitors to track vital signs and alert caregivers to any abnormalities.

2. Improve Care Coordination and Communication
- Electronic Health Records (EHRs): Adopt EHR platforms, such as Axxess, to ensure that all healthcare providers have access to up-to-date patient information. This enhances communication and coordination among care teams, leading to more effective and personalized care.
- Expand telehealth capabilities to provide remote consultations and follow-up care, making healthcare more accessible and convenient for patients

3. Increase Efficiency and Reduce Costs
- Integrate AI and automation to streamline administrative tasks, such as scheduling, billing, and documentation. This reduces the workload on staff and minimizes errors, leading to cost savings and improved efficiency.
- Implement smart home technologies, such as voice-activated devices and WiFi-connected appliances, to assist patients with daily activities and enhance their independence.

4. Enhance Patient Engagement and Satisfaction
- Develop and promote mobile health (mHealth) apps that enable patients to manage their health, schedule appointments, and communicate with their care providers. These apps empower patients to take an active role in their healthcare.
- Use virtual reality (VR) therapy to provide engaging and effective rehabilitation exercises for patients, particularly those recovering from strokes or dealing with chronic pain.

5. Support Staff and Caregiver Well-Being

- Introduce assistive robots to help with physically demanding tasks, reducing the risk of injury and burnout among caregivers.
- Invest in ongoing training for staff to ensure they are proficient in using innovative technologies and can provide the best possible care for patients.

6. Focus on Improving Patient Outcomes

Predictive and prescriptive analytics enhance patient outcomes by identifying potential health risks early and recommending personalized treatment plans. This proactive approach enables organizations to intervene promptly, reducing complications and improving overall patient health.

Predictive Analytics:

- Predictive models can analyze data from patients to identify early signs of clinical changes and risk, enabling timely interventions.
- By analyzing patient data, predictive analytics can identify individuals at high risk of readmission, enabling organizations to implement preventive measures.

Prescriptive Analytics:

- Prescriptive analytics can recommend tailored treatment plans based on a patient's unique medical history and current condition, optimizing outcomes.
- The care at home industry can use prescriptive analytics to determine the best allocation of resources, such as staff and equipment, to improve efficiency and patient care.

These applications help healthcare providers make more informed decisions, leading to better patient outcomes.

By embracing these innovative technologies, the home care industry can significantly improve patient care, enhance operational efficiency, and ensure the well-being of both patients and caregivers. This approach not only meets the current needs of patients but also positions organizations for sustainable growth in the future.