

2020 Home-Based Care Technology Survey

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Home-based care technology is here to stay

There is no getting around it: Technology services are critical for home-based care providers.

The only question is how quickly these providers will continue to implement them.

In this era of value-based payment models and rapidly spreading infectious diseases, home-based care providers are steadily increasing their utilization of technologies that help them virtually deliver care. From telephones to live video to online family portals to artificial intelligence, providers have a range of tools at their disposal to safely and efficiently bring top-flight care to patients.

But there remains room for growth. A significant number of home-based care providers report that they are either unsure about the value of these tools, getting by without them or not seeing enough client demand to implement them.

Those insights and more are from the 2020 Home-Based Care Technology Survey and Report, brought to you by HHCN in a partnership with **AlayaCare Inc.** We hope these industry insights will help you and your business into 2021.



Robert Holly

Editor, Home Health Care News

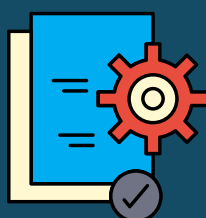
Executive Summary

The 2020 Home-Based Care Technology Survey reveals the views of more than 300 individuals polled about the home-based care industry for 2020. The survey, conducted online from May to June 2020, asked agencies about:

- The types of technology they are using to provide care
- The biggest pain points driving technology use
- The largest barriers to technology implementation
- The impact COVID-19 is having on technology plans

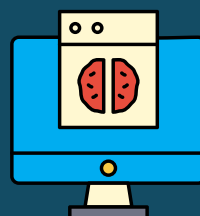
Results of the survey show the impact that external circumstances, client demand and internal capabilities are having today on technology decisions within home health and home care.

Key Takeaways



Virtual care services are popular, yet there is room for growth

While just over 70% of respondents report using some kind of technology to provide care, about 30% aren't using anything — no phones, no live video, no online portals.



COVID-19 and staffing are each having a significant impact

Close to 60% of respondents identified COVID-19's impact on operations and business as a pain point in home-based care, making the pandemic the most prominent pain point in the industry today. Staffing issues, meanwhile, continue to be an enormous challenge, including the caregiver shortage, utilization of team members and caregiver churn.

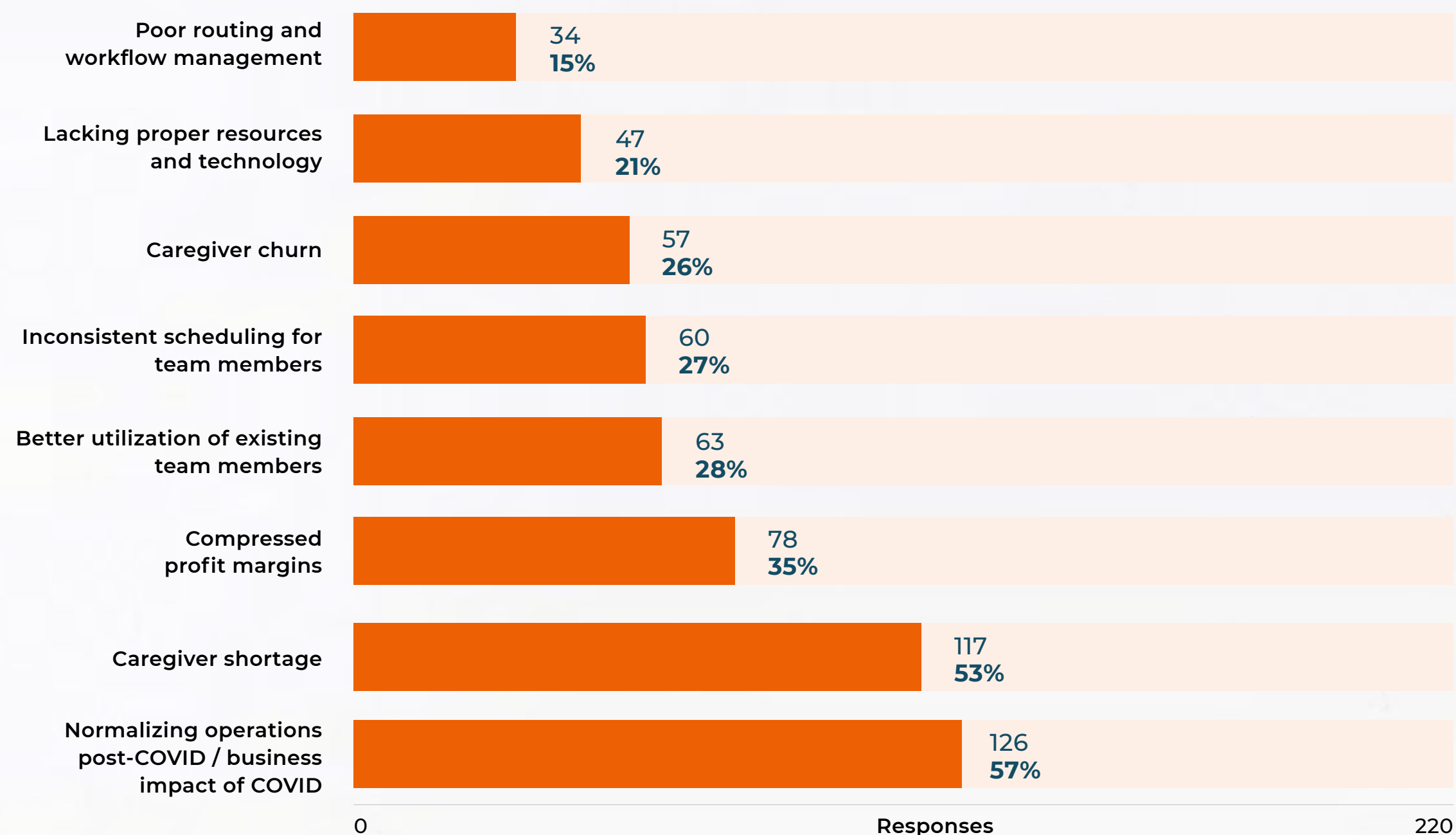


Providers are bullish on artificial intelligence, but more can be done

Close to two-thirds of respondents say they understand the benefit that artificial intelligence could have on their business, yet three in 10 have no opinion on how it could impact them. Thirty-six percent called AI and optimization technology something they could figure out "if I had time."

Which of the following business “pain points” are associated with your business today?

(select all that apply)

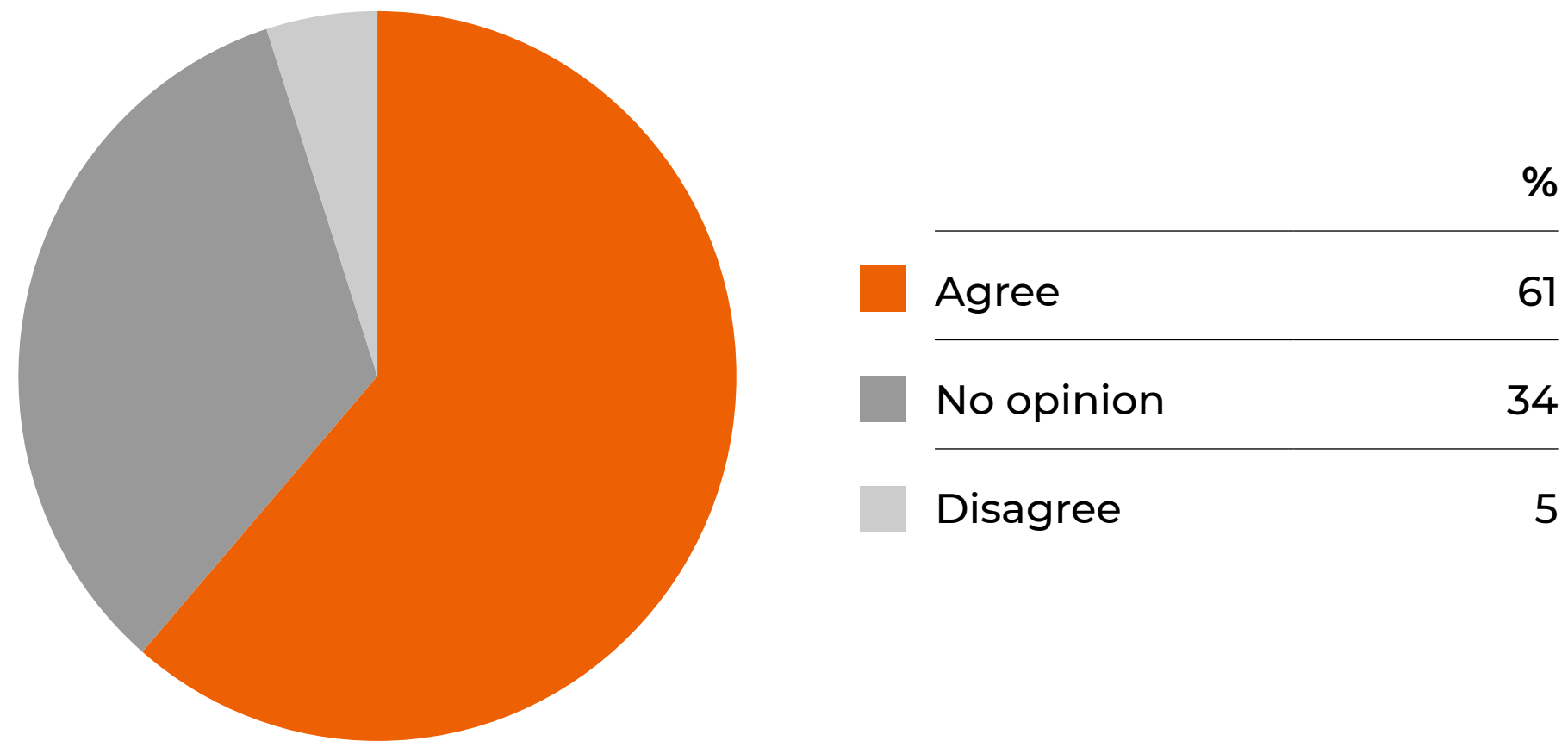


KEY TAKEAWAY

COVID-19 is the top challenge identified by home-based care operators in 2020, with nearly 60% of respondents choosing the pandemic's impact on both operations and business as a pain point. More than half of respondents also chose caregiver shortage as a pain point, while nearly 30% note that utilization of existing team members is a key problem, suggesting that re-imagining worker roles will be just as critical to succeeding in the COVID and post-COVID landscape as finding new talent.

React to this statement:

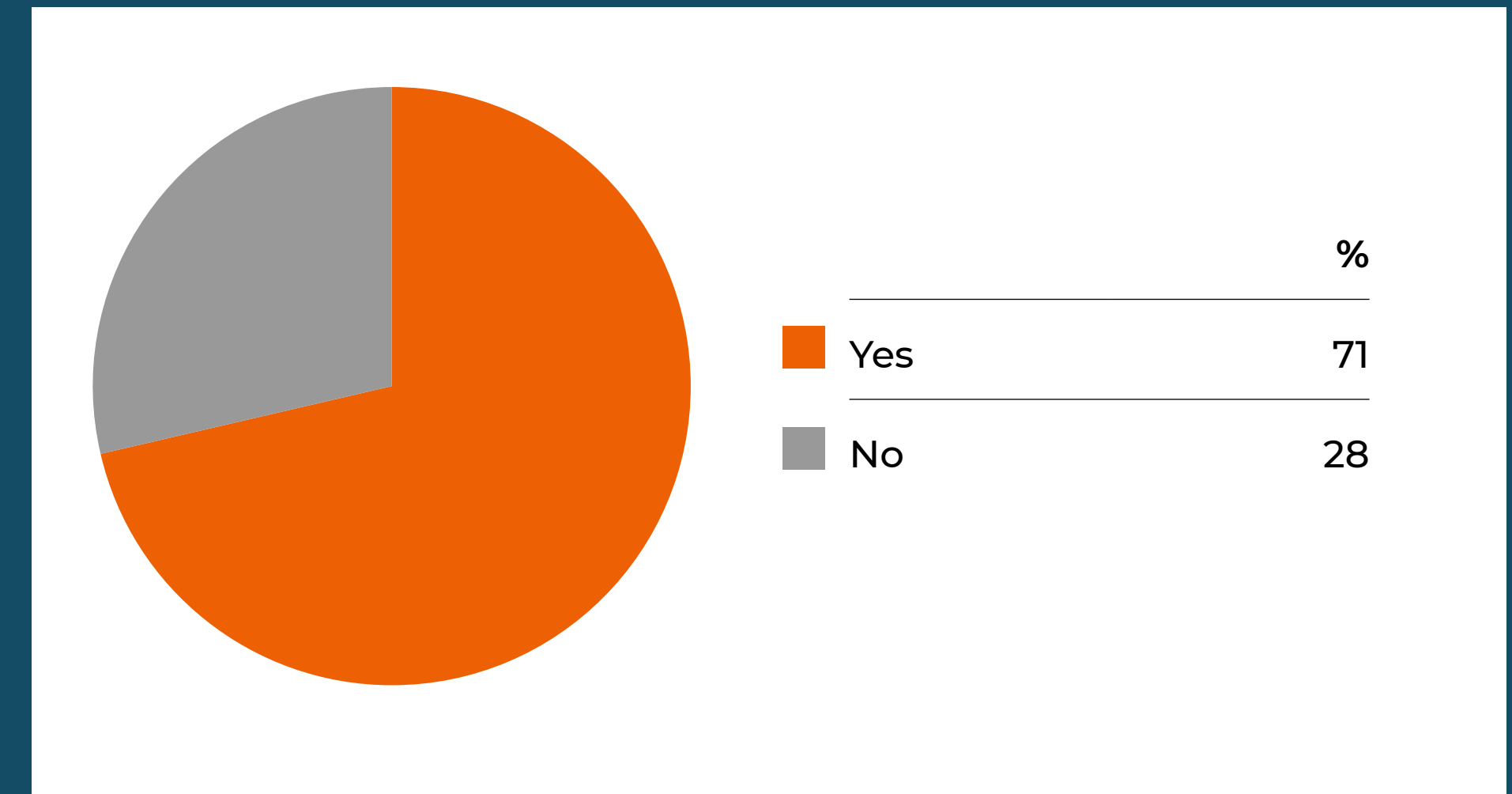
Integrating virtual solutions would help improve my business operations



KEY TAKEAWAY

While 61% of respondents say they agree there is value in virtual solutions for business operations, one third of respondents (34%) have “no opinion” — suggesting a potential opportunity for further engagement.

Are you using telephones, live video, online portals or any other technology to provide care?

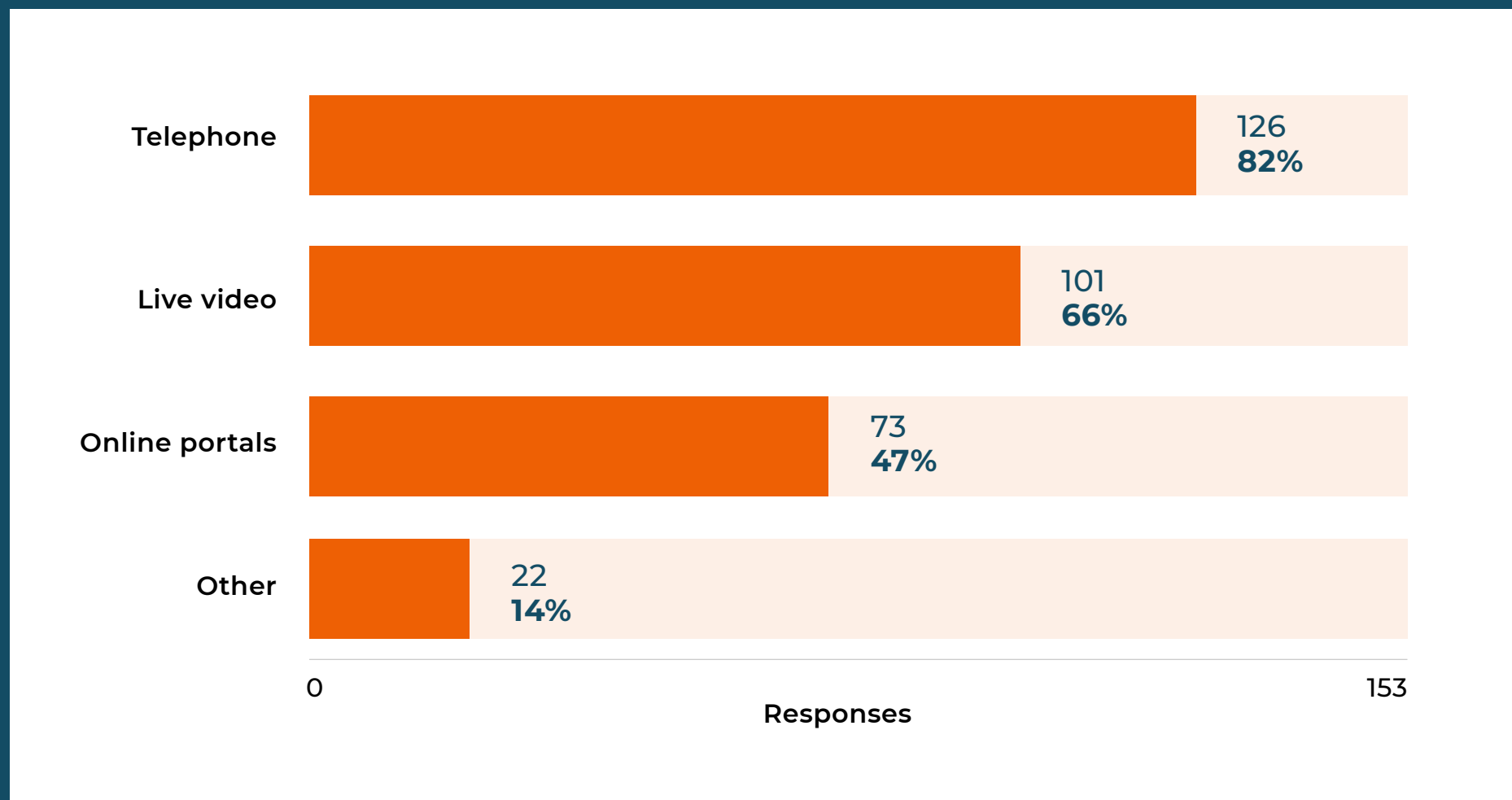


KEY TAKEAWAY

Nearly 30% of respondents report they are not using any technology to provide care.

For respondents using any type of technology to provide care, which of the following technologies are you using?

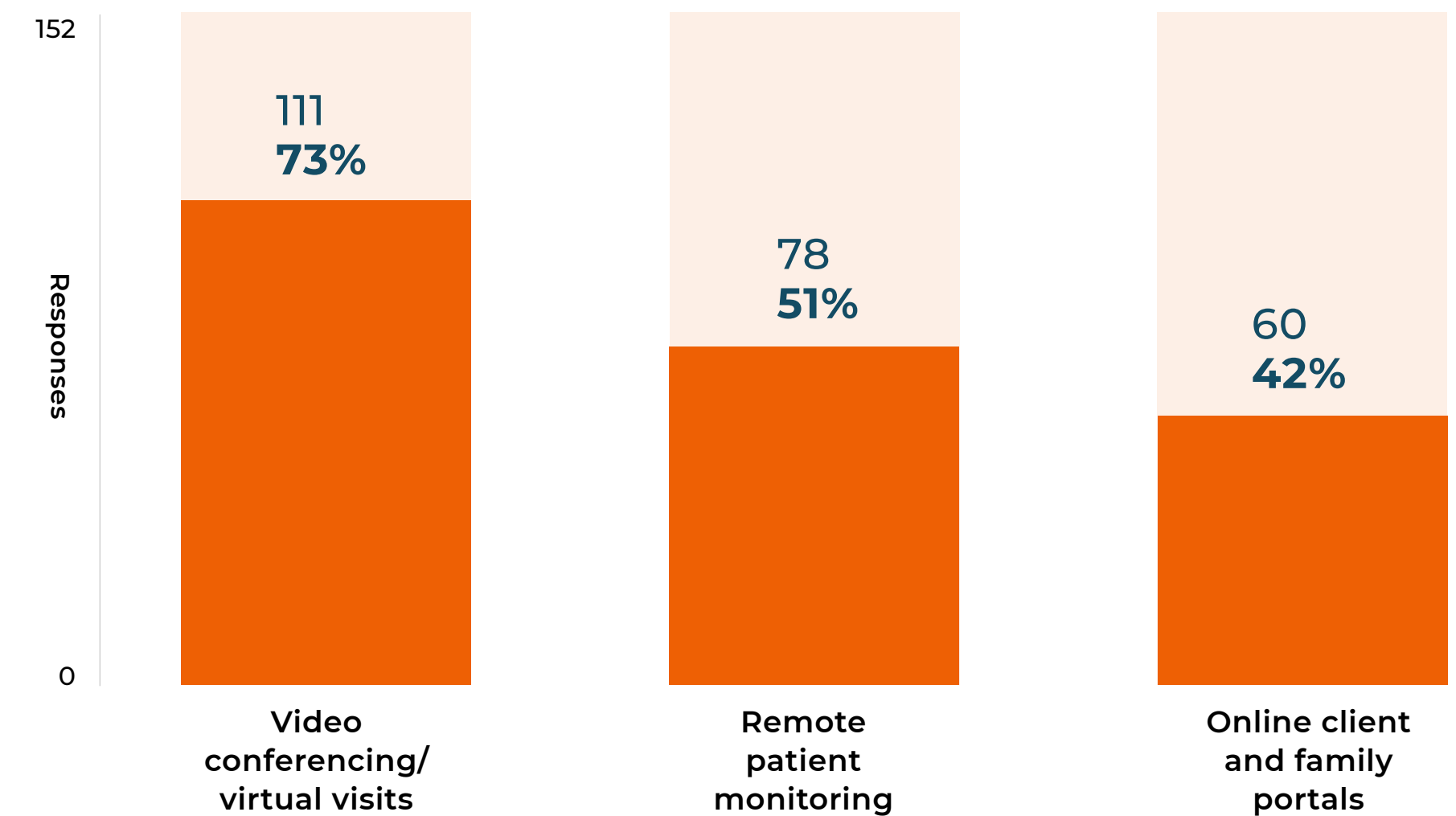
(select all that apply)



KEY TAKEAWAY

Telephone is easily the most popular care technology among home-based care providers, with 82% of respondents selecting it. Two-thirds of respondents report using live video. Less than half say they are using online portals to provide care.

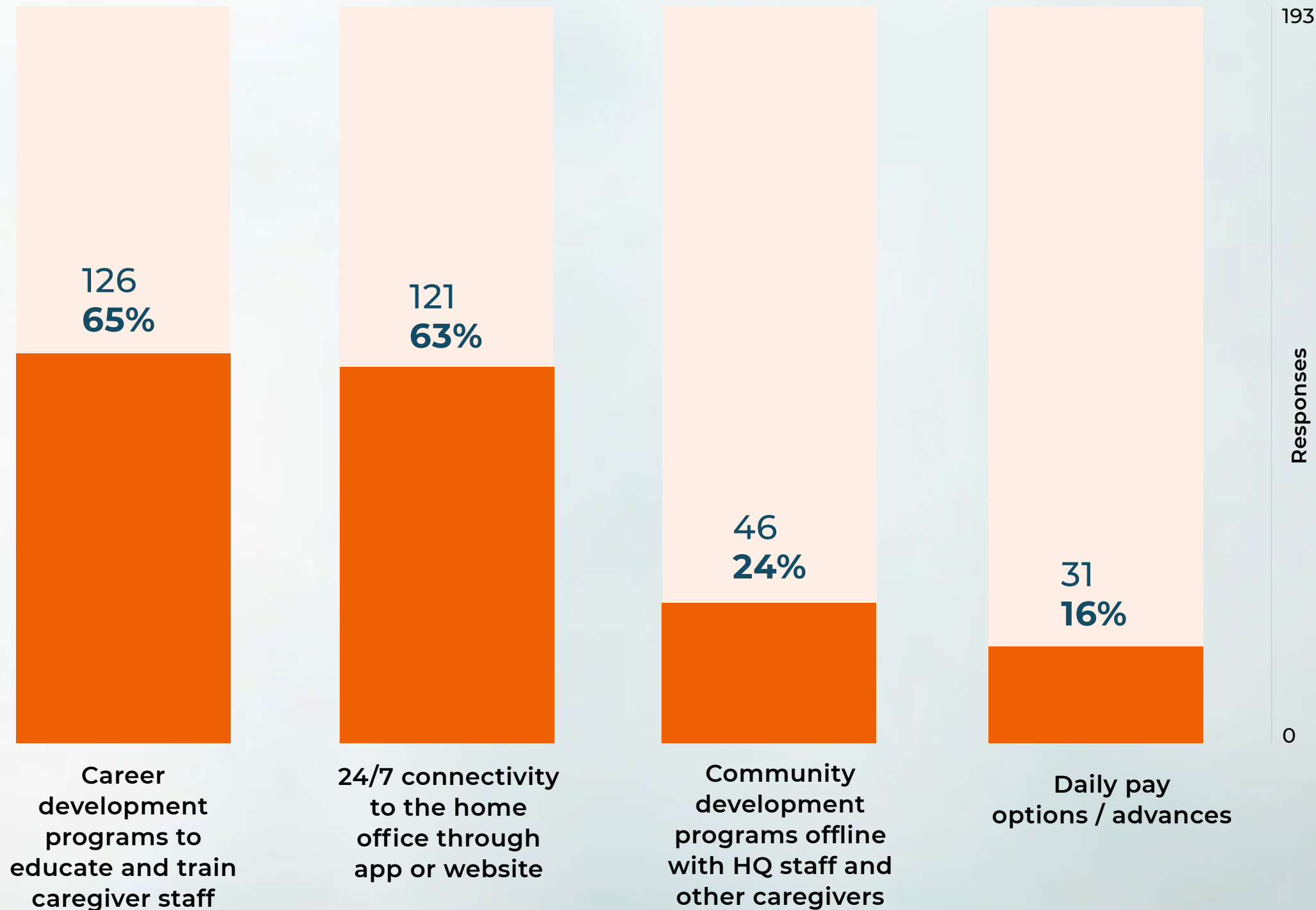
For respondents using any type of technology to provide care, which of the following virtual care services do you offer? (select all that apply)



KEY TAKEAWAY

Close to three-quarters of respondents report they are using video conferencing or virtual visits to provide care.

Caregiver churn is a problem for everyone. Which of the following do you offer to help fight the issue? (select all that apply)



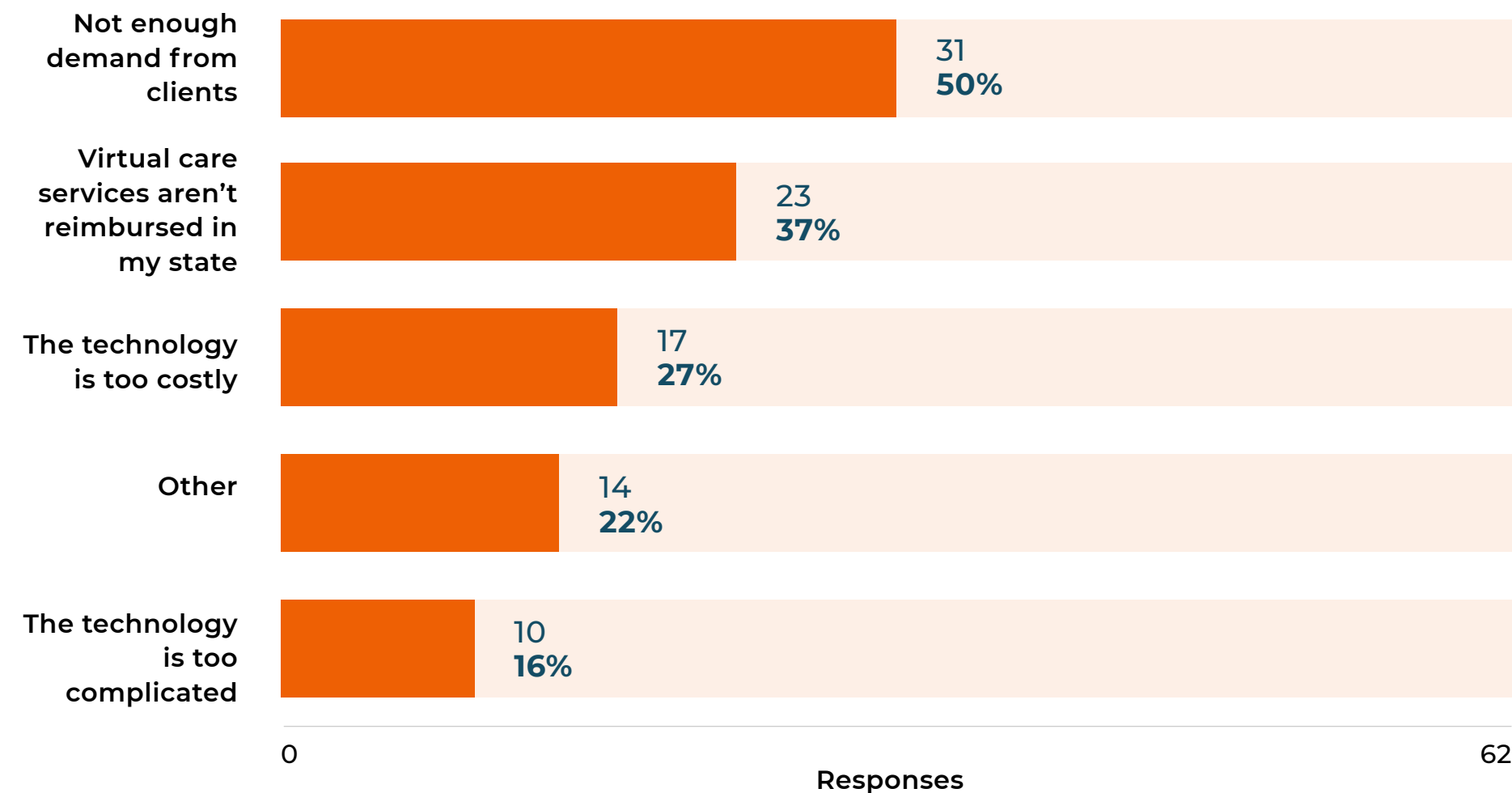
KEY TAKEAWAY

Two solutions for caregiver churn stand above the rest, with more than 60% of respondents reporting that they offer each one: career development programs for caregiver staff training and 24/7 connectivity to the company's office.



For respondents NOT using any type of technology to provide care, why haven't you implemented virtual care services?

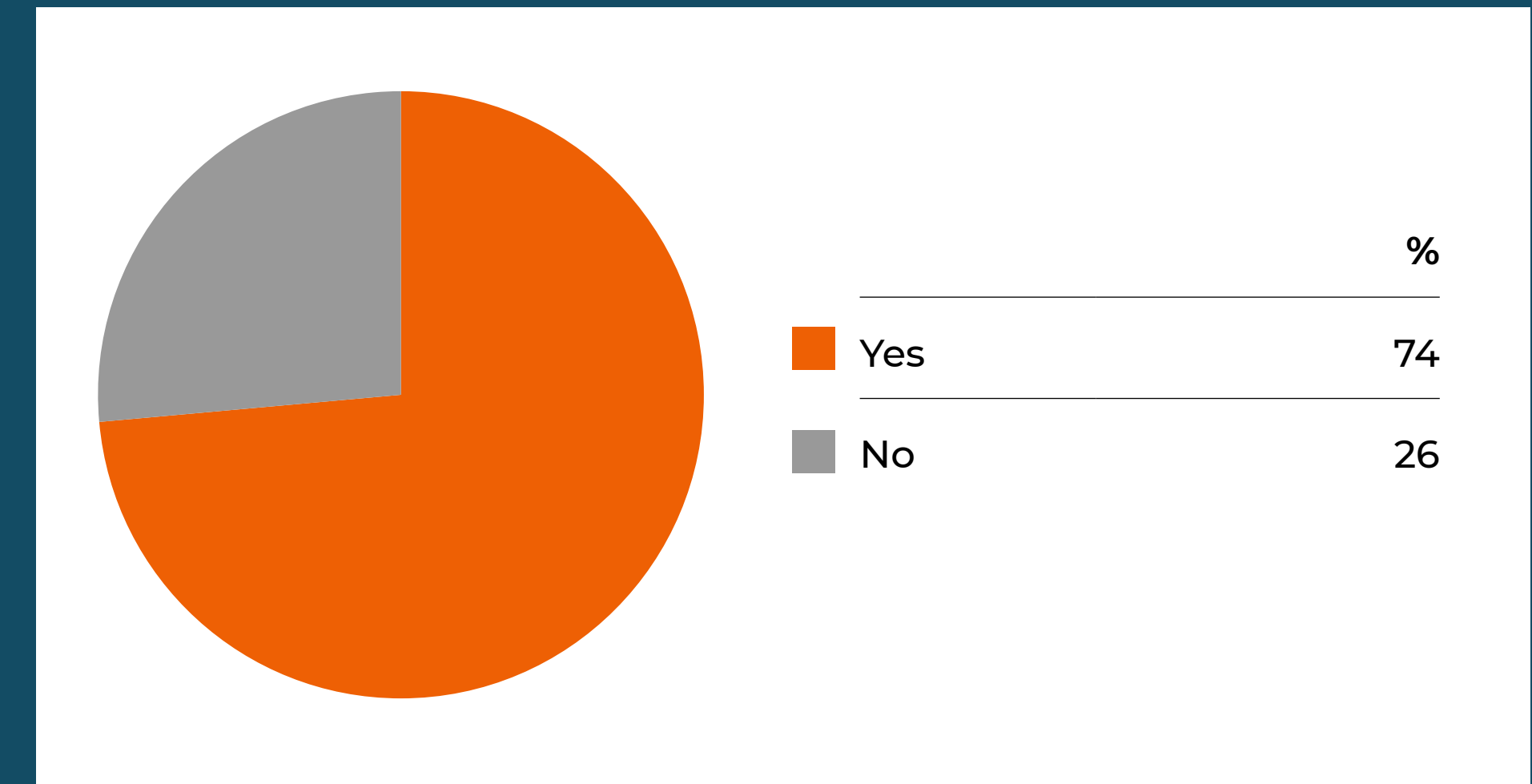
(select all that apply)



KEY TAKEAWAY

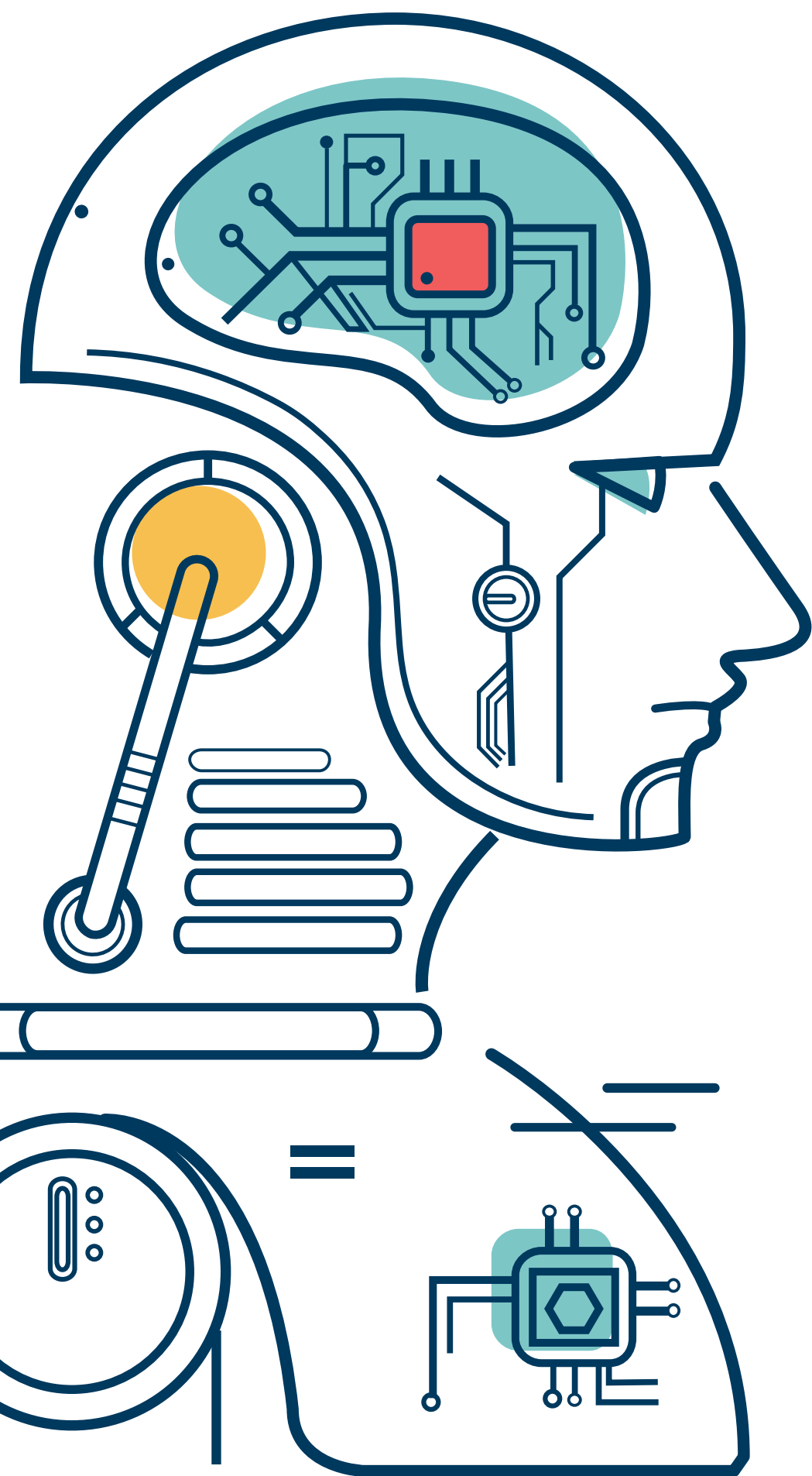
For half of respondents, one reason they have not implemented virtual care services is that there is no client demand. A lack of state reimbursement is holding back just over one third of respondents.

Since the COVID-19 pandemic, has your organization had to rethink its virtual technology needs?



KEY TAKEAWAY

Three-quarters of respondents say they have had to rethink their virtual technology needs since the COVID-19 pandemic, leaving a quarter of respondents who have made no such changes.



Artificial intelligence and in-home care

Complete the sentence:

In home health and home care, the use of artificial intelligence and optimization technology

Is here and available to me now	42%
Might be something I could figure out if I had time	36%
Is something I can use in 2-3 years	18%
Is science fiction	4%

KEY TAKEAWAY

Just over one third of respondents would use AI to deliver home-based care services if they had the time to learn it. While the majority of respondents see the benefits of artificial intelligence in home-based care delivery, there remains a significant swath of providers who have no opinion

React to this statement:

Artificial Intelligence technology methods would benefit my organization, such as optimization or machine-learning technologies.

Agree	63%
No opinion	30%
Disagree	8%

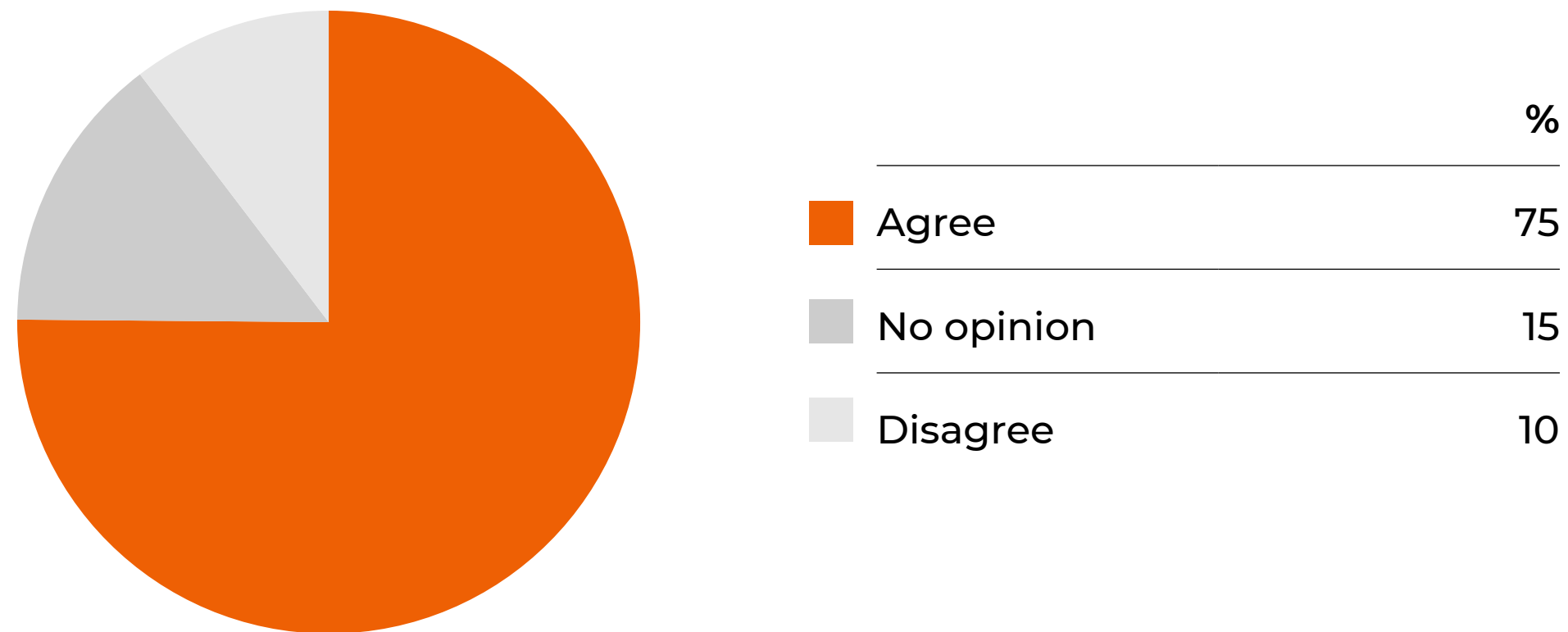
React to this statement:

I am willing to invest in AI if it is proven to help my business.

Agree	63%
No opinion	30%
Disagree	8%

React to this statement:

I have a clear understanding of how data can help my business.



KEY TAKEAWAY

Ten percent of respondents have no “clear understanding” of how data can help their business.

“As COVID-19 consumes our acute-care settings for the foreseeable future, the pressure on health systems to care for people in their homes will be overwhelming. We have always considered virtual care of prime importance, but as we are forced to rethink how home care is delivered, the pace of action in this area is heightened.”



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