

RaisedCare

USC Leonard Davis
School of Gerontology

The State of Home Care 2026

New research — and what it means for your agency
— from RaisedCare, in partnership with USC's
Leonard Davis School of Gerontology.

[READ THE 10 FINDINGS](#)



589

families with direct home care experience

110

agency owner-operators

10

findings for your home care agency

Built with USC's Leonard Davis School of Gerontology — the first school of gerontology in the world — this report is the clearest picture of home care buyers and operators in 2026.

If you're looking to grow your home care agency, start with this report. →

Behind this research

A partnership between the world's first school of gerontology and a growth-strategy firm built for home care.

USC LEONARD DAVIS SCHOOL OF GERONTOLOGY



Aaron Hagedorn, PhD

Instructional Associate Professor
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Aaron Hagedorn, PhD, is an Instructional Associate Professor at the USC Leonard Davis School of Gerontology. He has researched and taught gerontology and long-term care since the late 1990s. His work ranges from population health research to training home health aides during the Recovery Act era, which gives him both an academic and a frontline view of home care.

RAISEDCARE



Mike Theodore

Founder and Lead Strategist
RaisedCare

Home care agencies hire RaisedCare to grow revenue through evidence-based marketing, digital presence, and client acquisition. Mike spent five years inside a family-owned home care agency before starting RaisedCare. This study was commissioned by RaisedCare to provide the home care industry with buyer-side and owner-side data it has historically lacked.

The Big Picture

The families you're trying to win are filtering you out silently. And the owners you're competing with are so buried in payroll and turnover they can't see it happening.

Solving these challenges will unlock growth in 2027 and beyond.

KEEP READING FOR WHAT FAMILIES AND OWNERS ARE SAYING ABOUT HOME CARE →

FINDING 1

Agency Trust Is Earned through People, Not Institutions

FAMILY FINDING 1

Trust score by source (1–10)



THE KEY FINDING

Physician relationships and word-of-mouth outperform every digital trust signal. Reviews still matter — but mainly for the adult child, not the person receiving care.

WHAT THIS MEANS FOR YOUR AGENCY

Your referral network is critical to your success. Is your process documented, repeatable and measurable?

FINDING 2

You're Judged by Your Online Presence

FAMILY FINDING 2

Website dismissal rate by buyer type

64.1%

ADULT CHILDREN BUYERS

vs.

48.2%

SENIOR RECIPIENTS

dismiss providers based on poor website presence · $p=0.004$

THE KEY FINDING

Adult children buyers dismiss home care agencies on digital presence (website, socials, review sites) at nearly double the rate of seniors.

WHAT THIS MEANS FOR YOUR AGENCY

While your referral network is critically important, your digital presence is your front door. If it's poor, adult children move to the next agency. Have you audited your digital presence recently?

Web Pages that Matter Most

FAMILY FINDING 2

Website element impact score (0–10)



THE KEY FINDING

Caregiver and team profile pages are the single highest-ROI website investment — outranking testimonials and your company story combined.

WHAT THIS MEANS FOR YOUR AGENCY

This is a people-first industry. If you're not highlighting and showcasing your people, you're losing. When is the last time you looked at your team's page on your site?

How Owners Judge Their Own Websites



THE KEY FINDING

Only 49% of owners rate their website's landing pages as effective at converting visitors — and 27% admit they don't even measure it. Budget is shifting anyway: 53% increased digital marketing spend in the last 12 months.

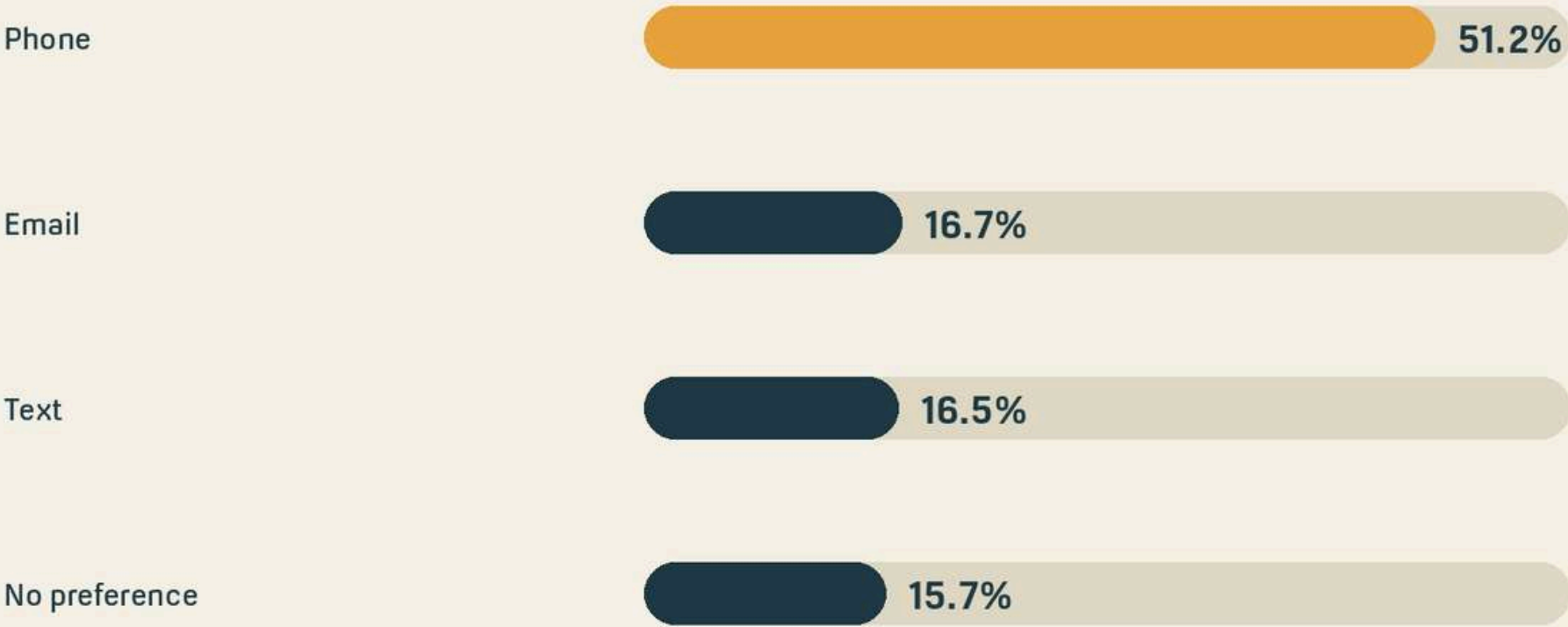
WHAT THIS MEANS FOR YOUR AGENCY

Does your website work? How can you tell? If you're spending money on marketing, you need to know the answers to those questions.

Phone-First Culture Persists

FAMILY FINDING 3

Preferred communication channel



THE KEY FINDING

The industry still prefers the phone over other methods. But more than a third of respondents prefer email or text communication

WHAT THIS MEANS FOR YOUR AGENCY

While phone is still preferred, your agency must be able to systemically communicate by email and text. Does your agency have a process to communicate by phone, email *and* text? Are you able to track response times across all three channels?

Families Expect a Fast Response

FAMILY FINDING 3

How fast families expect a response



THE KEY FINDING

Nearly 40% of families expect a response within four hours. And nearly 60% expect a call within a half of day.

WHAT THIS MEANS FOR YOUR AGENCY

Families aren't waiting around on your call. They're making calls to multiple agencies. If you don't have a documented service level agreement (SLA) with your staff on response times, you're losing families.

FINDING 3

How Fast Owners Say They Respond to Families

OWNER DATA

Response speed: reported vs. expected

Owners: respond within 2 hours



Families: expect a response within 2 hours



THE KEY FINDING

73.8% of owners say their team responds to inquiries within 2 hours — actually ahead of what families say they expect (19.3% want that speed). This is a bright spot in the data.

WHAT THIS MEANS FOR YOUR AGENCY

You might have this nailed. Do routine checks from cloaked phone numbers and email addresses. Make sure your team is constantly hitting that two-hour threshold.

FINDING 4

Safety Tech and 24/7 Support Aren't Differentiators for Agencies

FAMILY FINDING 4

Importance rating (0–10)



THE KEY FINDING

The expectations of families change over time. What were once strong differentiators are table stakes.

WHAT THIS MEANS FOR YOUR AGENCY

These aren't differentiators anymore — they're baseline credibility. Market them as confirmation you're a serious option, not as a unique selling point.

FINDING 5

Families Leave If They Don't Like the Sales Process

FAMILY FINDING 5

40%+

of families felt moderate or high sales pressure during intake

19.3%

rated provider communication as "very honest and trustworthy"

THE KEY FINDING

40% of families felt moderate or high sales pressure during intake. And less than 20% rated provider communication as very honest or trustworthy.

WHAT THIS MEANS FOR YOUR AGENCY

Audit your sales process. Recognize the stress families are experiencing when they reach out. Leading with empathy goes a long way. How do you showcase honesty and trustworthiness?

Reputation: Highly Valued, but Inconsistently Executed

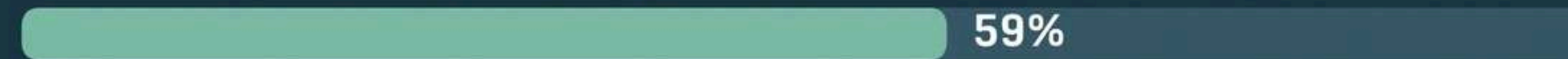
OWNER DATA

Reputation: valued vs. actually executed

Rate a 4.0+ star rating as very/critically important



Have a formal process for responding to negative reviews within 48 hours



Consistently ask satisfied families for a review at discharge



THE KEY FINDING

76% of owners call a 4.0+ star rating very or critically important. But only 59% have a formal process for responding to negative reviews within 48 hours, and just 21% consistently ask satisfied families for a review. 71% spend significantly less time on reputation management than on referral relationships — despite calling it a priority.

WHAT THIS MEANS FOR YOUR AGENCY

Implement a repeatable process for asking satisfied families for a review. What can you do to make this easy for your staff — and easier for the families?

Owners Report a Staffing Crisis



THE KEY FINDING

Owners are reporting a staffing crisis. 72% of owners had to cap clients due to staffing shortages in the last six months. And 81% say rising labor costs have squeezed margin.

WHAT THIS MEANS FOR YOUR AGENCY

Your caregivers are the lifeblood of your agency. Are you focusing your time on recruiting efforts? Have you asked how marketing can support recruiting?

The Referral Pipeline Is Shifting

OWNER DATA

Where leads come from — and how that's shifting

Word of mouth / direct family contact — largest lead source



Hospital / case-manager referrals



Agencies reporting DECLINING hospital referrals (vs. 3 years ago)



Agencies reporting GROWING hospital referrals (vs. 3 years ago)



THE KEY FINDING

Compared with three years ago, more agencies report declining hospital referrals (48%) than growing ones (24%) — while word of mouth is the largest share of qualified leads (39%).

WHAT THIS MEANS FOR YOUR AGENCY

Your referral pipeline remains critical. But when is the last time you refreshed your strategy and tactics? How are you tracking your efforts? Can you confidently state what is and isn't working?

Culture Over Campaigns



THE KEY FINDING

70% of owners agree organizational culture — retention and morale — drives growth more than any single marketing campaign. 89% track staff satisfaction or turnover as a KPI.

WHAT THIS MEANS FOR YOUR AGENCY

People work in home care because they want to help people. Keeping strong talent is paramount. How are you keeping your talent at your agency?

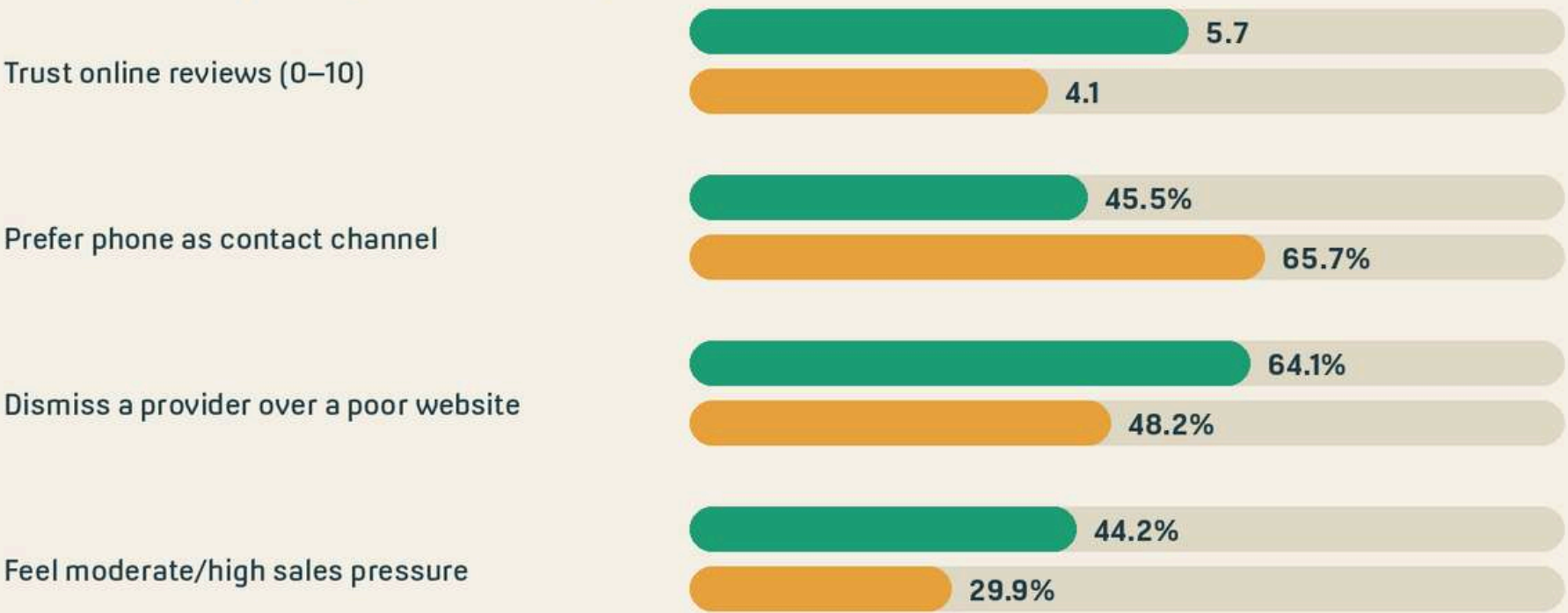
The Two-Audience Problem

FAMILY FINDING — THE TWO-AUDIENCE PROBLEM

Two buyers, one phone call



Where the two groups genuinely diverge



Children Buyers Senior Recipients

THE KEY FINDING
Agencies are serving two different buyers in the same phone call. Adult children buyers and senior recipients differ significantly on trust in reviews, preferred channel, patience for a response, website dismissal behavior, and sensitivity to sales pressure.

WHAT THIS MEANS FOR YOUR AGENCY
You cannot focus your efforts on one or the other. Your digital presence and your sales process must address both needs.

Methodology

FAMILY SURVEY (n=589)

- 589 respondents with direct home care experience
- 7 demographic slices analyzed: relationship to care recipient, gender, age group (Children Buyers vs. Senior Recipients), Snowbird Corridor states, High Aging States, Big Medicare markets, U.S. Super Regions
- Analyzed by USC Leonard Davis School of Gerontology
- Statistical significance tested via chi-square (categorical variables) and Mann-Whitney U (ordinal scales); all p-values reported in-text

OWNER SURVEY (n=110)

- 110 senior/home care agency owners and leaders
- 55-question instrument fielded February 13 – August 3, 2026
- 61% full completion (67 of 110); base sizes reported per question throughout due to drop-off
- Descriptive findings only; no statistical significance testing on the owner side
- Base sizes per question range from n=24 to n=80

FRAMING NOTES

- Both surveys are panel-based rather than probability samples of the U.S. population. Findings describe respondents, not Americans.
- Comparisons between the family and owner samples are directional, not causal.

SOURCES REFERENCED IN THIS REPORT

- RaisedCare × USC Leonard Davis School of Gerontology, 2026 Senior Home Care Consumer Survey (family-side)
- RaisedCare × USC Leonard Davis School of Gerontology, 2026 Senior Home Care Owner Survey (owner-side)
- RaisedCare, What Families Actually Say: National Analysis of 13,247 Google Reviews, 2026

Your Agency's Next Move

AUDIT YOURSELF

- Time your own intake response from a cloaked number and email. Compare it to the 2-hour benchmark 73.8% of owners claim they hit.
- Search your agency name and audit the results like an adult child would — the website, the reviews, the Meet the Team page. Would you dismiss you?
- Ask three satisfied families for a review. Just three. See if you have a process — or a person who happens to remember.

WHERE STRATEGY COMES IN

- A digital presence built for two audiences, not one — because adult children and senior recipients don't want the same site.
- An intake process that lowers pressure and raises trust — designed into the script, not left to whoever picks up.
- A referral pipeline you can measure — so when hospital referrals decline (48% report that), you know what's still working.
- A staff visibility system that also recruits — because your Meet the Team page and your hiring funnel are the same asset.

This is where RaisedCare comes in →

Take the Brand-Aid Diagnostic

16 QUESTIONS, INSTANT RESULTS.

A snapshot of where your growth strategy, trust signals, and intake process stand today — benchmarked against what families told us they actually want.

GET YOUR BRAND-AID SCORE

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GROWTH STRATEGY FOR AGING SERVICES

SCHEDULE AN INTRO CALL

RaisedCare.com

