

## From hospital to home: Analyzing the market dynamics of home health and hospital-at-home care

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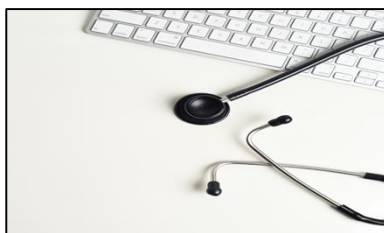
### Abstract

The home health care industry in the United States is expected to develop at a compound annual growth rate (CAGR) of 6.89% from 2023 to 2032, and is expected to reach approximately \$300 billion by 2028. The aging population, rising rates of chronic illnesses, the need for post-hospitalization care, and patient preferences for at-home care are some of the factors contributing to this growth. In addition to non-medical help with everyday life activities, home health care offers medical treatments such as skilled nursing and physical therapy. Large providers with the greatest patient volume, such as AccentCare, Amedisys, and Enhabit Home Health & Hospice, dominate the industry. To guarantee patient safety and high-quality care, home health agencies are subject to regulatory scrutiny. Home health care can also be a valuable source of information and respite for family caregivers. The capabilities of home health care have been increased by technological developments in telehealth and remote monitoring, which allow medical professionals to keep an eye on patients' status and interact with them from a distance. All things considered, the home health care sector is changing to accommodate the expanding and varied requirements of patients who want to receive treatment in the convenience of their own homes, offering an affordable and individualized substitute for traditional hospital settings.

**Keywords:** Home health care; Hospital-at-home; Aging population; Chronic illness management; Post-hospitalization care; Telehealth; Patient preferences; Regulatory oversight

### 1. Introduction

Home health care is a healthcare service that provides medical and non-medical care to individuals in the comfort of their own homes. It is a crucial component of the healthcare system, offering a wide range of services to meet the needs of patients who may have difficulty accessing care in traditional healthcare settings. The hospital-at-home market is projected to grow 50 percent by 2028, becoming a nearly \$300 billion industry, according to Modern Healthcare [1].



**Figure 1** Image of a stethoscope

Due to factors like an aging population, a rise in the frequency of chronic illnesses, and patient preferences for in-home care, the home health care market in the US is expanding quickly. The U.S. market for home healthcare services is

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expected to develop at a compound annual growth rate (CAGR) of 7.2% from \$94.17 billion in 2022 to \$153.19 billion by 2029, based on the market data provided. Furthermore, the market for home health care as a whole is projected to rise at a compound annual growth rate (CAGR) of 6.89% from 2023 to 2032, reaching around \$300 billion by 2028 [2].

A broad range of medical and non-medical services, such as skilled nursing care, physical therapy, medication administration, and help with daily living tasks, are included in home health care and are given to patients in their homes [3]. This sector is vital to the healthcare system because it provides a more individualized and affordable option to traditional healthcare facilities, especially for the elderly, people with chronic illnesses, and patients recuperating from hospital stays.

With a focus on the services available, the needs and advantages that drive the demand for home health care, the primary beneficiaries of these services, the regulatory framework, and the assistance given to family caregivers, this research article seeks to present a thorough analysis of the home health care market. The report also explores competitive landscape, technical developments, and market trends, providing insights into the industry's future course.

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## 2. Types of home health services

- **Medical Services:** These include skilled nursing care, medication management, wound care, and physical therapy. Skilled healthcare professionals such as registered nurses, licensed practical nurses, and physical therapists provide these services.
- **Non-Medical Services:** These encompass assistance with activities of daily living (ADLs) like bathing, dressing, meal preparation, and companionship. Home health aides and personal care assistants typically provide non-medical services.
- **Specialized Care:** Some patients require specialized care for conditions such as diabetes, Alzheimer's disease, or cancer. Home health agencies can provide trained professionals with expertise in managing these conditions.
- **Hospice Care:** Home-based hospice care focuses on providing comfort and support to individuals with terminal illnesses and their families. It includes pain management, emotional support, and end-of-life care.

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## 3. Benefits / need of home health care

- **Aging Population:** As the population ages, there is an increasing demand for home health care services. Older adults often prefer to receive care at home rather than in a hospital or nursing home.
- **Chronic Illness Management:** Many individuals are living with chronic health conditions that require ongoing care and management. Home health care can provide consistent monitoring and support for these patients.
- **Post-Hospitalization Care:** After a hospital stay, patients may require follow-up care and rehabilitation. Home health care can facilitate a smoother transition from the hospital to home.
- **Reduced Hospitalization Costs:** Home health care can be a cost-effective alternative to hospitalization, especially for patients who do not require round-the-clock medical supervision.
- **Improved Quality of Life:** Home health care allows individuals to remain in a familiar and comfortable environment, which can contribute to a better quality of life.
- **Patient Preferences:** Many patients prefer to receive care at home because it offers greater independence and a sense of control over their healthcare decisions.
- **Geographic Challenges:** In rural or remote areas, access to healthcare facilities may be limited. Home health care can bridge this gap by bringing essential healthcare services to patients' homes.
- **Family Caregiver Support:** Home health care services can relieve family caregivers of some of the responsibilities associated with caring for a loved one, reducing caregiver burnout.
- **Personalized Care:** Home health care services can be tailored to the specific needs of each patient, providing a more personalized approach to care.
- **Preventive Care:** Home health care can include preventive services such as health assessments, vaccinations, and education, helping to prevent the worsening of health conditions.
- **End-of-Life Care:** Hospice and palliative care services delivered at home can provide comfort and support to individuals with terminal illnesses and their families.
- **Technology Advancements:** Advances in telehealth and remote monitoring technologies have expanded the scope of home health care, enabling healthcare providers to monitor patients' conditions and communicate with them remotely.
- **Efficiency and Convenience:** Home health care can reduce the burden of transportation and waiting times associated with traditional healthcare settings, making it a more convenient option for many patients.

- **Pandemic Response:** During public health crises, such as the COVID-19 pandemic, home health care gained importance as a means to reduce the risk of exposure to the virus while ensuring ongoing care for patients.
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#### 4. Who receives home health care?

- **Seniors:** The elderly population often utilizes home health care services to manage chronic conditions and age-related health issues.
  - **Patients with Chronic Illnesses:** Individuals with conditions like diabetes, heart disease, or COPD can receive ongoing care at home.
  - **Post-Hospitalization Patients:** After a hospital stay, patients may require follow-up care and monitoring, which can be provided at home.
  - **Patients with Disabilities:** People with disabilities may benefit from home health care to maintain their independence and manage their healthcare needs.
  - **Paediatric Patients:** Children with complex medical conditions may receive home health care, allowing them to stay with their families and reducing hospitalization.
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#### 5. Regulations and oversight

Regulations and oversight in home healthcare are essential components to ensure patient safety and quality of care. Home healthcare agencies are subject to regulatory scrutiny to uphold standards, including compliance with Medicare and Medicaid regulations, state licensing requirements, and accreditation standards. This oversight is crucial in maintaining the integrity of home healthcare services and safeguarding the well-being of patients receiving care at home.

Caregiver support is another significant aspect of home healthcare services, offering respite for family caregivers and providing them with education and support to manage their responsibilities effectively [5]. By addressing the needs of caregivers, home healthcare services contribute to reducing caregiver burnout and ensuring the continuity of care for patients. This support system plays a vital role in enhancing the overall care experience and promoting the well-being of both patients and their caregivers.

The market analysis of home healthcare services reveals substantial growth potential, with top competitors like AccentCare, Amedisys Inc, and Bayada Home Health Care serving a significant number of patients in the industry [4]. This growth is fueled by factors such as technological advancements in telehealth, the efficiency and convenience of home healthcare services, and the increased importance of home health care during public health crises like the COVID-19 pandemic. As the market expands, these key players are instrumental in driving innovation and development within the home healthcare sector, meeting the evolving needs of patients and caregivers alike.

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#### 6. Caregiver support

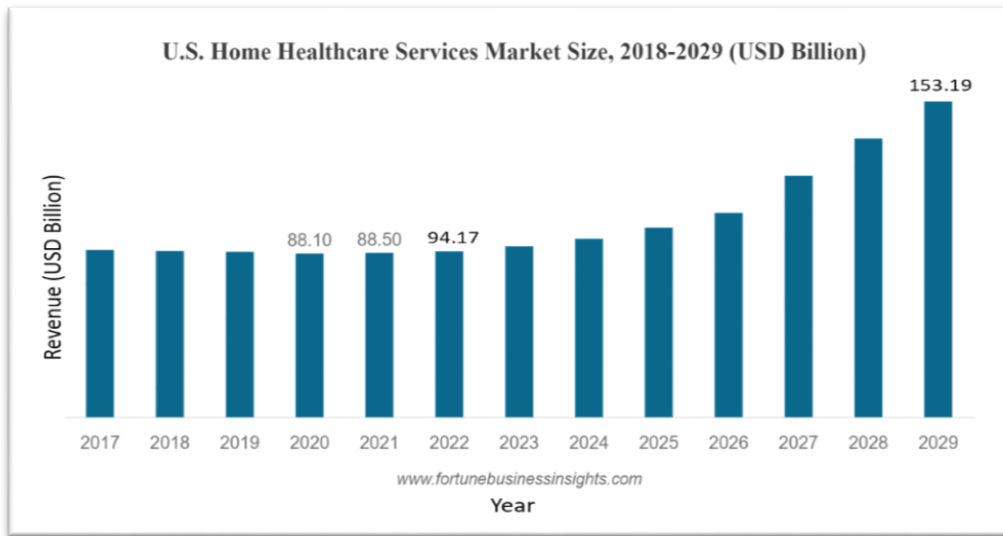
Caregiver support is a fundamental aspect of home healthcare services, providing essential respite for family caregivers who play a crucial role in the well-being of patients. Home health care services recognize the demanding nature of caregiving responsibilities and aim to alleviate caregiver burden by offering much-needed breaks and support. Caregivers often face physical, emotional, and mental strain from the continuous care they provide, making respite care a valuable service that allows them to recharge and attend to their own well-being [5].

In addition to respite care, home healthcare services include caregiver education and support to equip caregivers with the necessary skills and knowledge to effectively care for their loved ones. Education programs can cover topics such as medication management, wound care, and specialized care techniques, empowering caregivers to provide high-quality care at home. Support services may also include counselling, mental health resources, and access to community support groups, fostering a holistic approach to caregiver well-being and ensuring they have the tools to navigate the challenges of caregiving [6].

Furthermore, caregiver support in home healthcare extends beyond practical assistance to encompass emotional and psychological support. Caregivers often experience feelings of stress, isolation, and burnout due to the demands of caregiving, highlighting the importance of emotional support services [7]. Home health care agencies may offer counselling services, mental health resources, and caregiver support groups to address these emotional needs and provide a safe space for caregivers to express their concerns, seek guidance, and connect with others facing similar challenges.

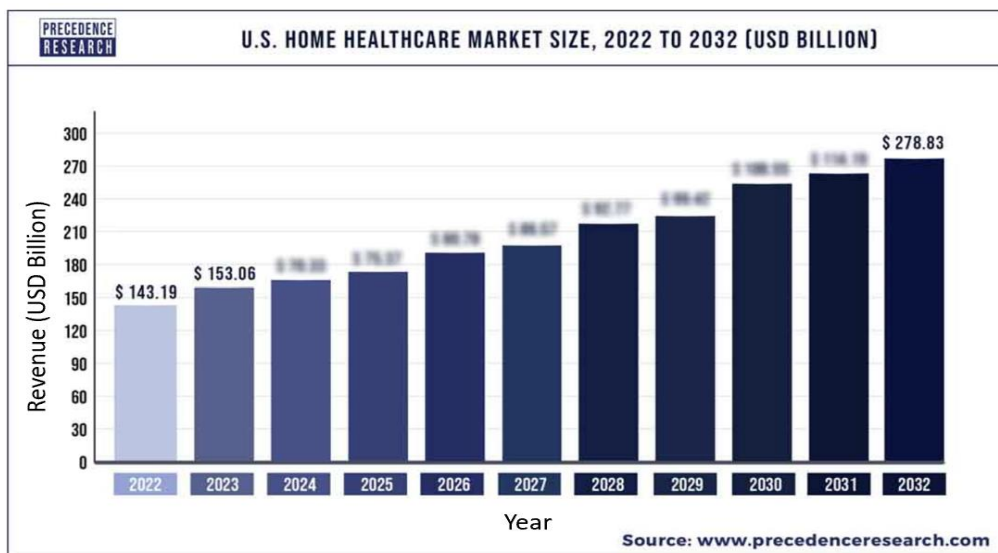
Overall, caregiver support in home healthcare is a multifaceted approach that recognizes the invaluable role of caregivers in the care continuum. By offering respite care, education, and emotional support, home health care services aim to enhance the well-being of both patients and caregivers, promoting a supportive environment that prioritizes the health and resilience of those involved in the caregiving process.

## 7. Market trend analysis



**Figure 2** U.S. home healthcare market size, 2018 to 2029 (USD billion)

The U.S. home healthcare services market is projected to experience continued growth at a CAGR of 7.2% from USD 88.50 billion in 2021 to USD 153.19 billion by 2029 (Fortune Business Insights, 2022) [1].



**Figure 3** U.S. home healthcare market size, 2022 to 2032 (USD billion)

The U.S. home healthcare market is expected to exhibit steady growth according to a report by Precedence Research (2023). The market size is projected to increase from USD 143.19 billion in 2022 to USD 278.83 billion by 2032, reflecting a compound annual growth rate (CAGR) of 6.89% (Precedence Research, 2023) [8]. This growth is attributed to several factors, including the aging population, rising prevalence of chronic diseases, and the increasing preference for in-home care due to its convenience and cost-effectiveness.

**Table 1** Top 10 home health agencies in the United States, ranked by total patients

Rank	Home health Agency name	Total patients
1	AccentCare	400,300
2	Amedisys Inc	322,582
3	Enhabit Home Health & Hospice	231,842
4	Bayada Home Health Care	126,419
5	Interim HealthCare	112,251
6	VMS Health (FHA Visiting Nurse Service of New York	86,695
7	Elara Caring	61,530
8	Aveanna Healthcare	61,493
9	Trinity Health at Home	59,179
10	UPMC Home Healthcare	44,952

The table reveals the leading home health agencies in the US based on 2022 patient volume. Notably, AccentCare reigns supreme with over 400,000 patients, followed closely by Amedisys Inc and Enhabit Home Health & Hospice. This dominance by a few key players suggests a trend towards consolidation within the home healthcare industry.

2020 Top 10 Home Health Providers	2020 Top 10 Hospice Providers
1. <b>Kindred Healthcare</b> , Louisville, KY	1. <b>Vitas® Healthcare</b> , Miami, FL
2. <b>Amedisys</b> , Baton Rouge, LA	2. <b>Kindred Healthcare</b> , Louisville, KY
3. <b>LHC Group Inc.</b> , Lafayette, LA	3. <b>HCR Manorcare</b> , Toledo, OH
4. <b>Encompass™ Home Health &amp; Hospice</b> , Dallas, TX	4. <b>Amedisys Inc.</b> , Baton Rouge, LA
5. <b>AccentCare Inc.</b> , Dallas TX	5. <b>Seasons Hospice &amp; Palliative Care</b>
6. <b>Bayada® Home Health Care</b> , Moorestown, NJ	6. <b>CURO® Health Services LLC</b> , Mod
7. <b>Brookdale Senior Living Solutions</b> , Brentwood, TN	7. <b>Compassus™</b> , Brentwood, TN
8. <b>Elara Caring</b> , Addison, TX	8. <b>Compassionate Care Hospice</b> , Pa
9. <b>Interim HealthCare® Inc.</b> , Sunrise, FL	9. <b>Lifepath Hospice</b> , Tampa, FL
10. <b>Trinity Health at Home</b> , Livonia, MI	10. <b>Hospice of the Valley</b> , Phoenix, A

**Figure 4** This is a list of the top 10 home health providers and top 10 hospice providers in 2020

Several factors might be driving this consolidation. Economies of scale could be a significant factor, as larger agencies can negotiate better rates with suppliers and healthcare facilities. Additionally, a larger patient base allows for broader service offerings and geographic reach. Furthermore, mergers and acquisitions could be a strategy to expand market share and access new patient populations.

Kindred Healthcare was identified as the leading home health provider in the US for 2020, while Vitas Healthcare topped the hospice provider rankings. This data suggests consolidation within the industry, with several companies appearing on both lists.

**Table 2** Market share based on number of claims

Home Health Provider	Market Share	Hospice Provider	Market Share
Kindred Healthcare	6.0%	Vitas Healthcare	4.4%
Amedisys, Inc.	5.0%	Kindred Healthcare	4.3%
LHC Group, Inc.	4.4%	Amedisys, Inc.	2.9%
Encompass Home Health & Hospice	3.9%	HCR Manorcare	2.2%
Accentcare	1.7%	Seasons Hospice & Palliative Care	2.6%
Bayada Home Healthcare	1.4%	Compassus	0.9%
Brookdale Senior Living	1.2%	Charters Health System	0.8%
Elara	1.1%	Hospice of the Valley	0.7%
Interim Healthcare	1.0%	Crossroads Hospice & Palliative Care	0.6%
Trinity Healthcare at home	0.9%	Trustbridge, Inc.	0.6%
Combined Market share of top 10 home health providers	26.6%	Combined Market share of top 10 Hospice Providers	19.0%

The above data, provides a glimpse into the market share distribution of home health and hospice providers in the United States. Notably, Kindred Healthcare reigns supreme in the home health sector, capturing 6.0% of the market based on claim filings. Other major players include Amedisys Inc, LHC Group, Encompass Home Health & Hospice, and AccentCare. Interestingly, there is some overlap between the top home health and hospice providers, with Kindred Healthcare appearing at the forefront of both categories. This suggests potential consolidation within the industry, where some companies may be expanding their service offerings to encompass both home healthcare and hospice services.

**Table 3** Top home health agencies by net patient revenue

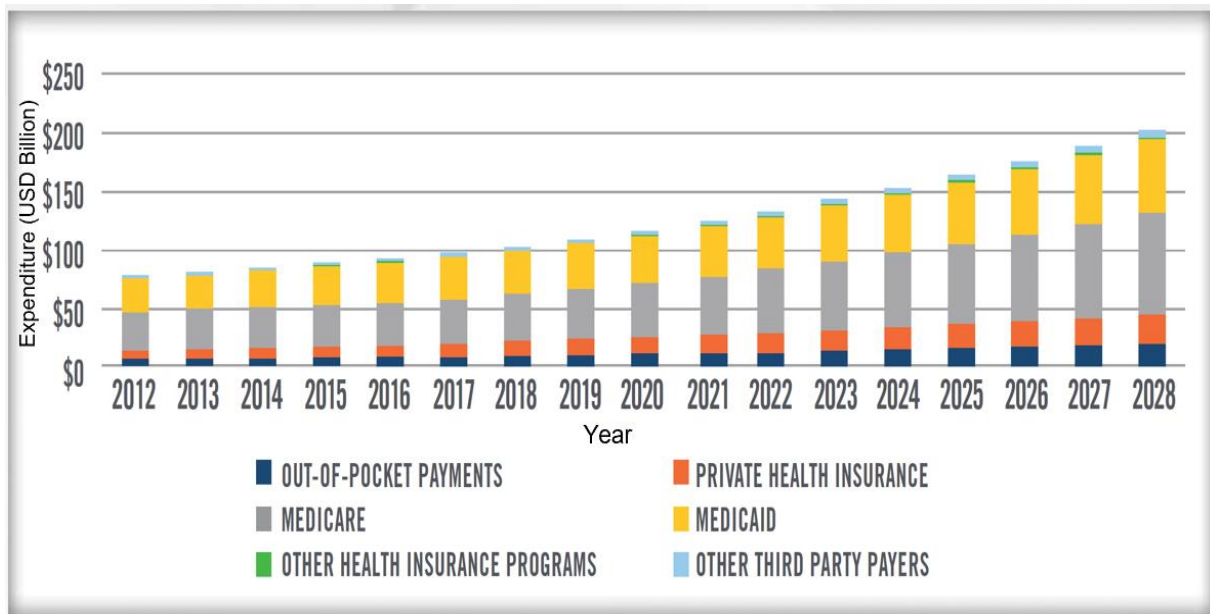
Rank	Home Health Agency name	State	Net Patient revenue
1	Maxim Healthcare Services	MD	\$1,662,326,297
2	Amedisys Inc.	LA	\$1,394,605,713
3	Enhabit Home Health & Hospice	TX	\$802,576,145
4	Bayada Home Health Care	NJ	\$594,406,777
5	AccentCare	TX	\$513,039,237
6	Interim HealthCare	FL	\$372,702,438
7	South Central Foundation Home based Services	AK	\$369,702,438
8	VNS Health (FKA Visiting Nurse Services of NY)	NY	\$260,015,998
9	Elara Caring	TX	\$250,033,105
10	Aveanna Healthcare	GA	\$232,973,892
11	Trinity Health at Home	MI	\$208,711,961

A 2022 ranking based on net patient revenue reveals Maxim Healthcare Services as the leading home health agency in the United States, with a staggering \$1.66 billion. Amedisys Inc follows closely behind at \$1.39 billion, highlighting the dominance of larger agencies within the market. This trend towards consolidation could be driven by economies of scale, allowing bigger players to negotiate better rates and offer a wider range of services.

**Table 4** Home health and Hospice Market Size

	Home Health	Hospice
Number of Agencies	11,300	4,840
Medicare Beneficiaries Receiving Services	3.3 Million	1.6 Million

The above table shows the number of home health agencies and hospice agencies in the United States in 2020. There were 11,300 home health agencies and 4,840 hospice agencies according to the data. This suggests that home health care is a more prevalent service than hospice care in the United States.



**Figure 5** Home Health Expenditures in Billions of USD

- **Out-of-Pocket Payments:** This refers to the money you pay directly for services not covered by insurance or exceeding your coverage limits. Depending on your insurance plan and specific service, you might have out-of-pocket costs for copays, coinsurance, or deductibles.
- **Medicare:** The federal health insurance program for people 65 and older, or individuals with certain disabilities, can cover a significant portion of home health care costs. It typically covers skilled nursing care, therapy services, and some durable medical equipment needed at home. However, there may be copayments or limitations on the number of days covered.
- **Medicaid:** This joint federal and state program provides health coverage for low-income individuals and families. Medicaid programs vary by state, but many cover home health care services for eligible beneficiaries.
- **Private Health Insurance:** Many employer-sponsored and individual health insurance plans offer coverage for home health care services. Coverage details vary depending on the specific plan, but it might include skilled nursing, therapy, and some home health aide services. You'll likely have out-of-pocket costs associated with your plan.
- **Other Health Insurance Programs:** There might be other health insurance programs specific to your situation, such as TRICARE for military families or CHAMPVA for dependents of veterans. These programs may have their own coverage guidelines for home health care.
- **Other Third-Party Payers:** In some cases, other entities besides health insurance might be responsible for home health care costs. For example, worker's compensation insurance might cover home health services if your need for care arises from a work-related injury.

Home health costs are shown in Figure 5 for the years 2012 through 2019 along with expected costs through 2028. Through 2028, CMS anticipates that costs associated with home healthcare would rise by almost 7% annually [9].

## 8. Conclusion

The aging population, rising incidence of chronic illnesses, the need for post-hospitalization care, and patient preferences for at-home care are some of the causes behind the enormous growth of the home health care sector in the United States. The market dynamics mirror this growth, with the home healthcare industry in the United States expected to reach \$300 billion by 2028. Numerous medical and non-medical services are provided by home health care agencies, such as medication administration, skilled nursing care, physical therapy, and specialist treatment for diseases including Alzheimer's and diabetes. In order to uphold industry standards and protect patient welfare, home health agencies comply with state licensing requirements, Medicare and Medicaid laws, and accreditation criteria. This regulatory control guarantees patient safety and the provision of high-quality care.

Furthermore, a critical component of home healthcare services is caregiver support, which offers family caregivers, who are essential to patient care - relief, education, and emotional support. Home healthcare services strive to improve the overall care experience, lessen caregiver fatigue, and guarantee patient continuity of care by attending to the requirements of caregivers. With major competitors like AccentCare, Amedisys Inc., and Bayada Home Health Care serving a sizable patient base in the home healthcare sector, the market trend study emphasizes the sector's development potential. The efficiency and convenience of home healthcare services, the development of telehealth technology, and the growing significance of home health care in times of public health emergencies like as the COVID-19 pandemic are the main drivers of this growth.

## Compliance with ethical standards

### *Disclosure of conflict of interest*

No conflict of interest to be disclosed.

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