WEBINR

Key Findings from the 2026 Benchmarking Report



Activated Insights
Benchmarking Report

17 Years of the Activated Insights Benchmarking Report



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About the 2026 Benchmarking Survey

Activated Insights
Benchmarking Report



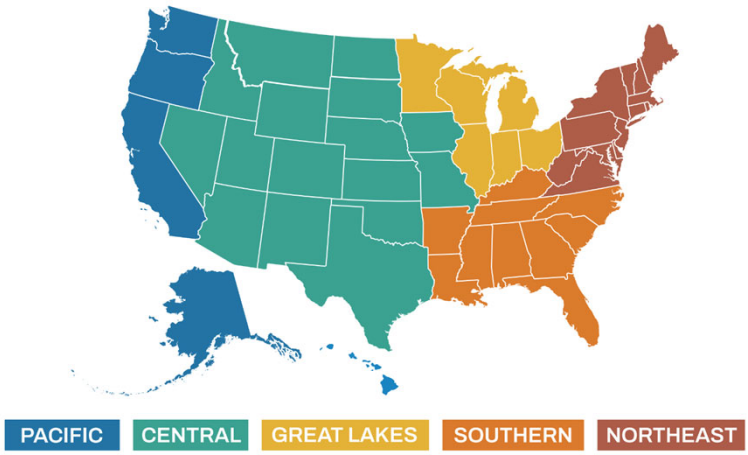
Who Participated in the Survey?

- 1080 Respondents
- 1 Core Line of Business: Home Care
- Both Activated Insights Users and Non-Users

The question this year's data raises: why are top-performing agencies pulling further ahead, even as conditions improve industry-wide?

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Where Does Arizona Fit?



Arizona falls within the Central region.

Where the data allows, we'll check the national benchmark alongside Central region numbers throughout this session.

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Theme #1

Satisfaction is at record highs, and it's driving referrals, retention, and revenue

KEY FINDINGS FROM THE 2026 BENCHMARKING REPORT

Satisfaction is at record highs, and it's driving referrals, retention, and revenue

Care professional satisfaction
9.17
Highest in report history

Client satisfaction
9.09
4th straight year of improvement

Client Turnover
41.3%
Continuing an 8-year decline

Word-of-mouth referrals
23.9%
Still the #1 acquisition source

Data taken from the 2026
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The Flywheel Effect

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Theme #2

Caregiver turnover has stalled, but the data shows which strategies actually reduce it.

2

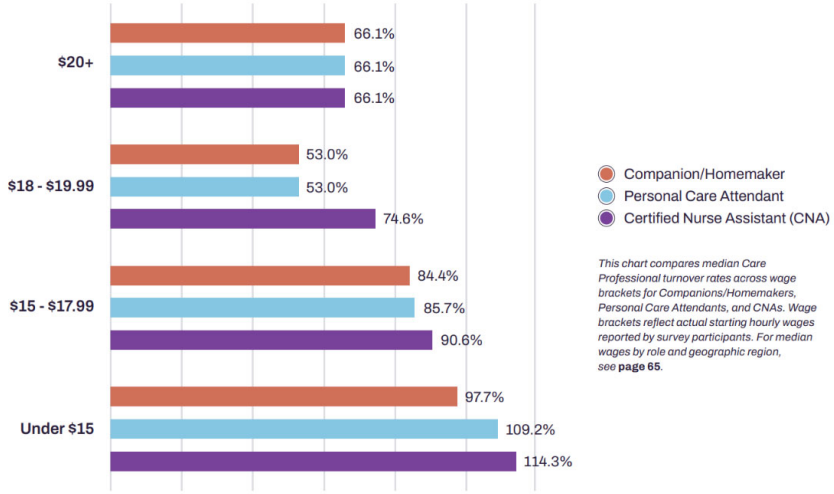
KEY FINDINGS FROM THE 2026 BENCHMARKING REPORT

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The Wage Inflection Point

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3.25 Median Turnover by Wage Bracket - Companion/Homemaker, PCA & CNA



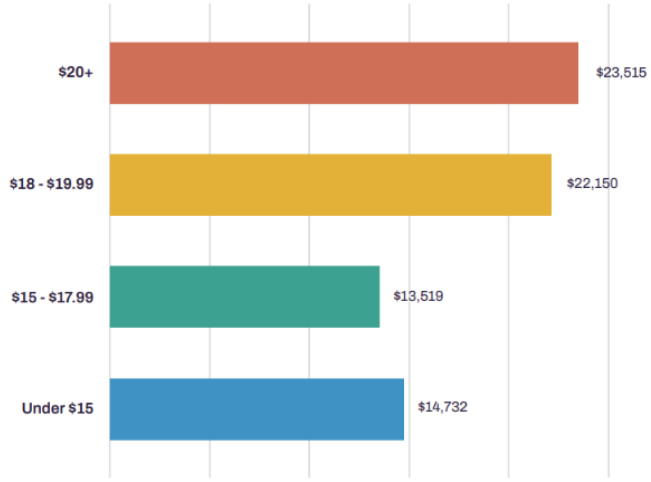
This chart compares median Care Professional turnover rates across wage brackets for Companions/Homemakers, Personal Care Attendants, and CNAs. Wage brackets reflect actual starting hourly wages reported by survey participants. For median wages by role and geographic region, see **page 65**.

Data taken from the 2026
Activated Insights
Benchmarking Report

The Wage Inflection Point

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3.26 Median Revenue per Care Professional by Wage Bracket for 2025



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Caregiver turnover has stalled

Median turnover rate
75.5%
Essentially flat after peaking at 79.2% in 2023

Care Professional Recognition Rating
9.0
Unchanged YoY

Benefits adoption
94.1%
Multi-year high

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Data taken from the 2026 Activated Insights Benchmarking Report

How Central Region Compares

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Metric	National	Central Region
Care professional turnover (median)	75.5%	75.6%
Live-in daily wage (median)	$253	$250
CNA wage (median)	$18.00	$17.00
PCA wage (median)	$17.00	$15.25
Companion/Homemaker wage (median)	$17.00	$16.00

Central wages run at or below the national median across these core caregiver roles, alongside a turnover rate holding even with the rest of the country.

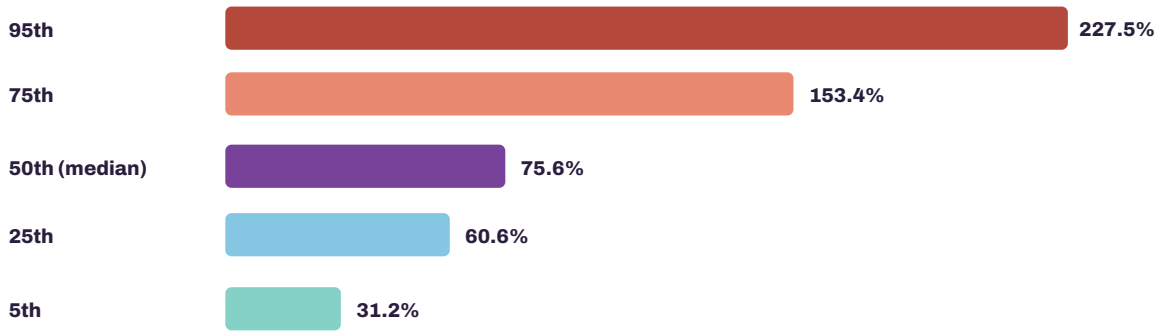
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Where Do You Fall?

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Care Professional Turnover, Central Region — 2025



Find your own turnover rate on this ladder. If you're below 60.6%, you're outperforming three-quarters of your Central-region peers.

Data taken from the 2026
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Beyond Benefits

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- Benefits adoption is at a multi-year high, a genuine win for the industry
- Wages remain the clearest driver of turnover, and the median sits just below the biggest inflection point
- Recognition is the lowest-scoring of the five care professional categories tracked, and it hasn't moved year over year



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Theme #3

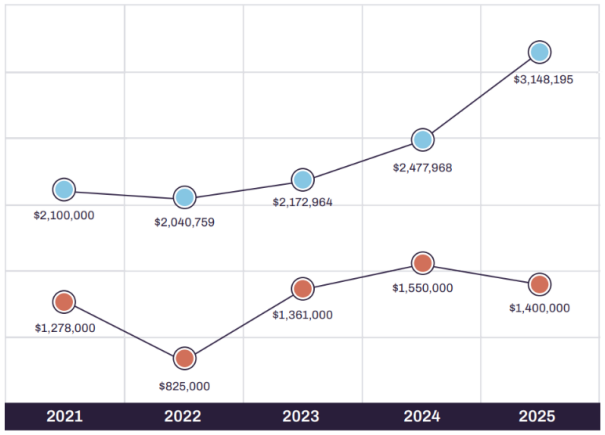
Measurement is the clearest differentiator among high-performing agencies.

KEY FINDINGS FROM THE 2026 BENCHMARKING REPORT

Median revenue, by inquiry-tracking behavior

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2.4 Historical Inquiry Tracking Comparison - Median Revenue



Track Every Inquiry
Do Not Track Every Inquiry

This graph shows the median revenue for those providers who track every inquiry about services versus those providers who do not track every inquiry about services.

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The pattern holds further down the funnel

45%+ inquiry-to-admission

$3.99M

vs. $2.38M for agencies with less than 45% inquiry to admission rate

Link to training outcomes

41.3%

of agencies can measure the connection

Track hospital admissions

31.6%

up from 25.4%, but still a minority

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Data taken from the 2026 Activated Insights Benchmarking Report

The tracking gap

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Measurement doesn't require capital. It requires systems, discipline, and the decision to look — and the agencies making that decision are pulling ahead, with the gap showing up alongside their revenue numbers.

This is a direct answer to the question we opened with — why top performers keep pulling further ahead even as the whole industry improves. Measurement is the clearest differentiator we found in this year's data.



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Theme #4

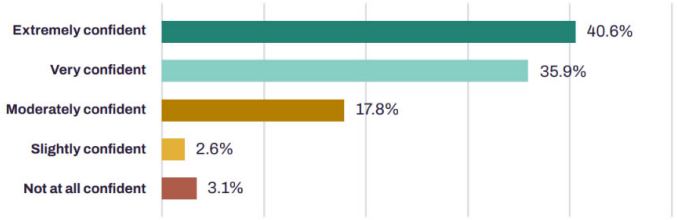
Caregivers love their training. Administrators aren't sure it's working.

KEY FINDINGS FROM THE 2026 BENCHMARKING REPORT

Two kinds of confidence

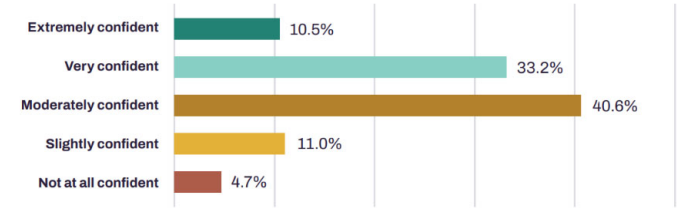
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4.5 Confidence Meeting Training Compliance Requirements in 2025



Survey participants were asked, "How confident are you that your agency's training program meets current federal and state compliance requirements?"

4.15 Confidence in Role-Specific Training in 2025



Survey participants were asked, "How confident are you in your agency's training plan's ability to build and reinforce role-specific competency for caregivers?"

33 ppt

gap between confidence in meeting requirements and confidence in real skill-building

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Caregivers rate their training highly

Training received rating

9.11

Up YoY and near the top of the 5 categories tracked within employee experience surveys

Training effort spent on replacement

40%+

of total effort, for nearly half of agencies

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Data taken from the 2026 Activated Insights Benchmarking Report

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Where the gap shows up

Training rated highly by caregivers → **Admins uncertain it builds real competency** → **Costs surface downstream: complaints, turnover, confidence on the job**

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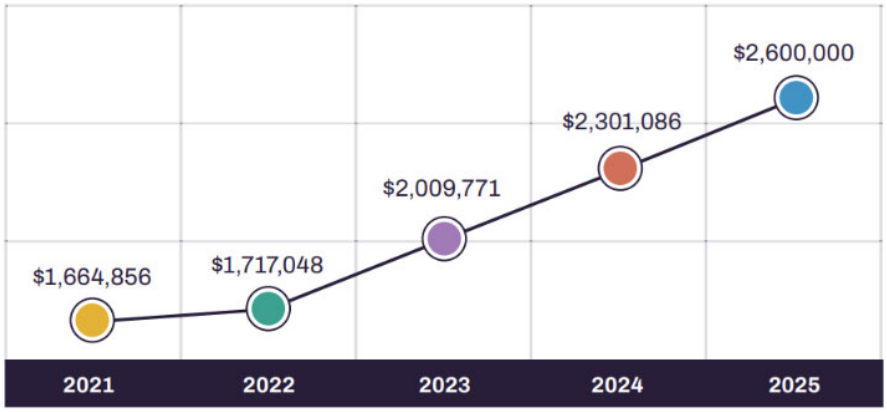
Theme #5

Revenue is up across the industry, and the operators protecting margin are the ones being deliberate about how they grow.

KEY FINDINGS FROM THE 2026 BENCHMARKING REPORT

Median revenue, 2021 to 2025

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Up 13% in 2025 alone, and 56% since 2021. 95th percentile revenue hit $16M, up 35%.

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How Central Region Compares

Metric	National	Central Region
Median revenue (2025)	$2,600,000	$2,897,000

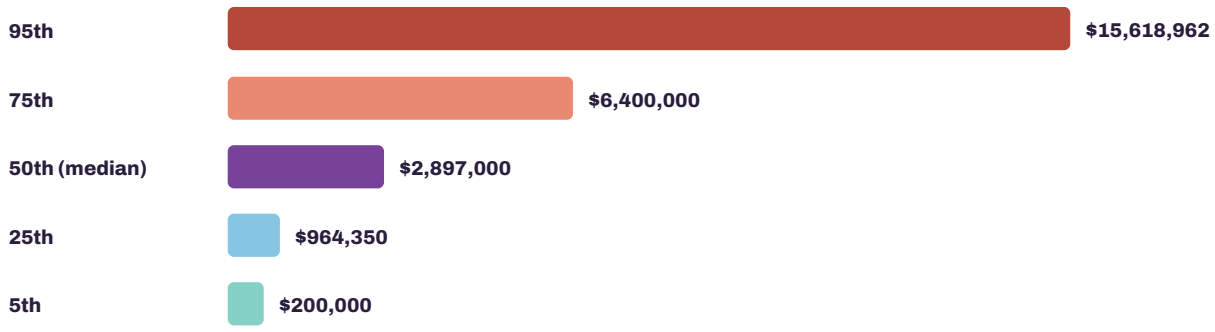
Central agencies are running above the national revenue benchmark — a strong starting point heading into this year's biggest question: what separates the agencies pulling further ahead from the rest of the pack?

Data taken from the 2026 Activated Insights Benchmarking Report

Where Do You Fall?

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Median Revenue, Central Region — 2025



Find your own agency's revenue on this ladder — the gap between the 75th and 95th percentile is where this year's data shows the real separation happening.

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Growth is broad-based, so is cost pressure

Billing rate, 1–2 hr visits
$46
up from $42.50

Customer acquisition cost
$861
3rd straight year of increase

Private pay share of revenue
59.5%
down from 65.3%

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The margin squeeze

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- Revenue is climbing at every level, from the median up through the 95th percentile
- But acquisition costs keep rising, and the payer mix is shifting away from the highest-margin source
- The agencies managing this well are the ones tracking their funnel closely enough to know when a dollar of revenue is worth pursuing



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Theme #6

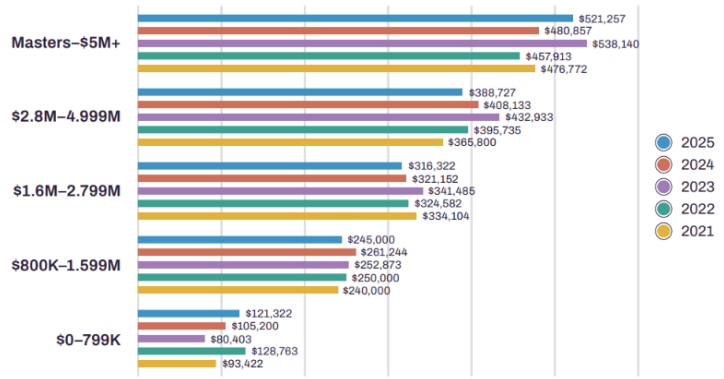
Technology is becoming the most common way agencies control costs and grow efficiently.

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Revenue per office staff employee, by revenue tier

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6.25 Historical Sales per Office Staff Employee - Revenue Ranges



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Automation is now the top cost lever

Cite automation as #1 cost-reduction strategy

37.3%

ahead of reduced overtime (35.5%) and pricing changes (31.3%)

Required training delivered online

55.3%

associated with higher compliance confidence than in-person

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How Central Region Compares

Metric	National	Central Region
Office staff turnover (median, 2025)	12.5%	17.0%

Central runs the highest office staff turnover in the country — worth a look given how much this section leans on office staff efficiency as a cost lever.

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Doing more with less

- Office staff headcount is declining across every segment, even as revenue holds steady or grows
- Only Masters agencies are turning that decline into more revenue per remaining employee
- The open question is whether smaller agencies are gaining efficiency, or quietly becoming administratively stretched



Data-Driven Recruitment, Training, & Retention Steps to Use Today

1

Satisfaction

Satisfaction is at record highs, and it's driving referrals, retention, and revenue.

2

Turnover

Caregiver turnover has stalled, but the data shows which strategies actually reduce it.

3

Measurement

Measurement is the clearest differentiator among high-performing agencies.

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Data-Driven Recruitment, Training, & Retention Steps to Use Today

4

Training

Caregivers love their training. Administrators aren't sure it's working.

5

Revenue & Margin

Revenue is up across the industry, and the operators protecting margin are the ones being deliberate about how they grow.

6

Technology & Automation

Technology is becoming the most common way agencies control costs and grow efficiently.

KEY FINDINGS FROM THE 2026 BENCHMARKING REPORT

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What This Means for Your Agency

See how you compare:
Throughout this session, Central-region benchmarks on revenue, turnover, and wages gave you a regional reference point — and the percentile ladders let you place your own agency without saying a number out loud.

What's driving top performers:
Measurement is the clearest differentiator we found — the agencies tracking their funnel, their training outcomes, and their inquiry-to-admission rate are the ones pulling ahead.

Your highest-leverage areas:
For most agencies in this room, that points to two places to start. First, pick one thing to automate this year — whether that's qualifying and scheduling caregiver interviews so good candidates don't go cold, or systematically distributing surveys to gather client and caregiver feedback so you're not relying on word-of-mouth alone. Second, start tying training to outcomes — you can't know if your program is building compliance or building confidence unless you're consistently collecting feedback, and unless your training approach goes beyond the basics to build real role-based skill.

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Meet Your Speaker & Meet Activated Insights

Caleb Hendricks

Sr. Director of Sales

report@activatedinsights.com



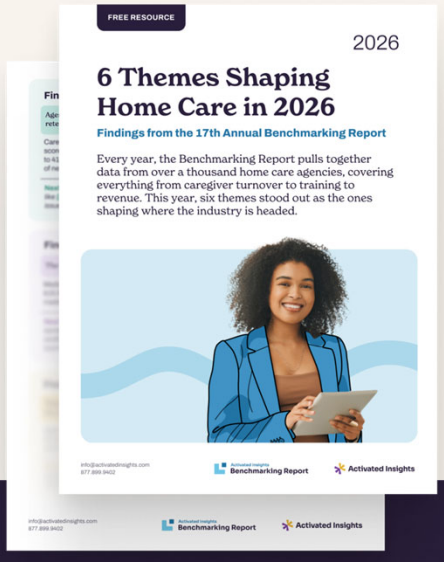


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