

Home Care Provider Pulse 2026

what you told us

How home care providers are running the business under
Support at Home, and what they need from their software next.

140

people took part

77

provider organisations

Thank you.

140 of you, from 77 organisations, took time out of the Support at Home transition to tell us how running home care really feels right now. What follows is what you told us, as you told it, and at the end, how we'll use it.

Shaun Cornelius, Chief Executive Officer, Lookout

AT A GLANCE

Two groups, one survey

TOTAL RESPONSES

140

people took part, across two
question sets

77

Home care provider organisations

17

Operational priorities rated

14

Leaders: CEOs, general managers
and executives

126

Operational staff across care, finance,
rostering and IT

THE HEADLINE

Leaders and frontline teams landed on the same pain:
budget and financial visibility under Support at Home.

LEADERS

#1 time-cost (4.43 out of 5) and #1 ranked priority for the next 12 months

OPERATIONAL TEAMS

Budget tracking in their top 3 priorities and the #1 thing they wish their software did

01

What leaders told us

14 CEOs, general managers and executives on where time and money go, what they'll invest in, and how ready they feel for Support at Home.

Budget management costs leaders more time than anything else

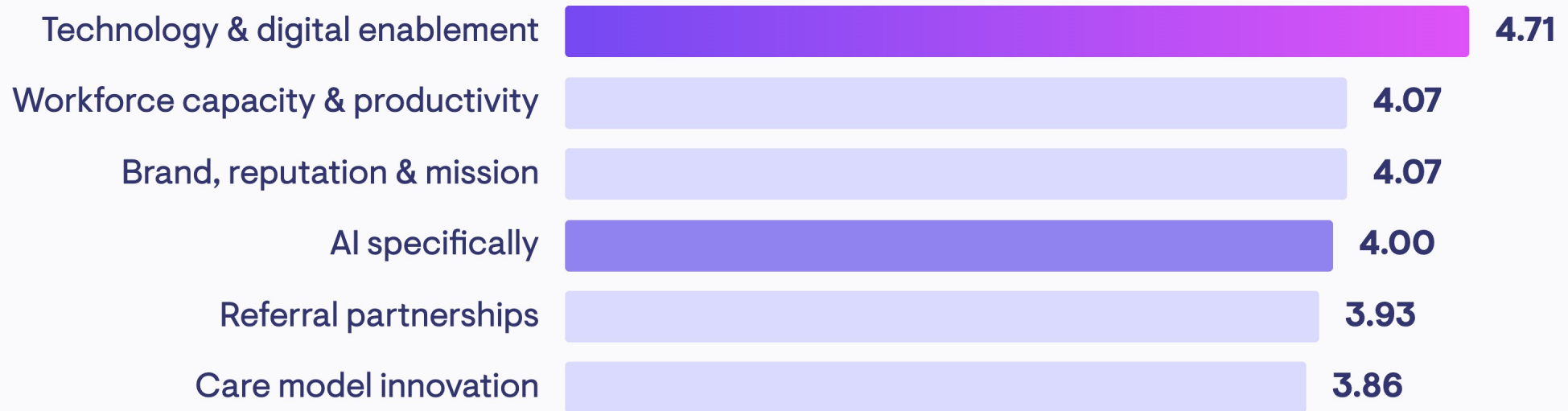


Their 12-month priority ranking follows the same order

- 0** Budget management • avg rank 3.0
- 01** Associated providers • 3.2
- 02** Rostering & compliance • 4.2
- 03** Care quality • 4.5

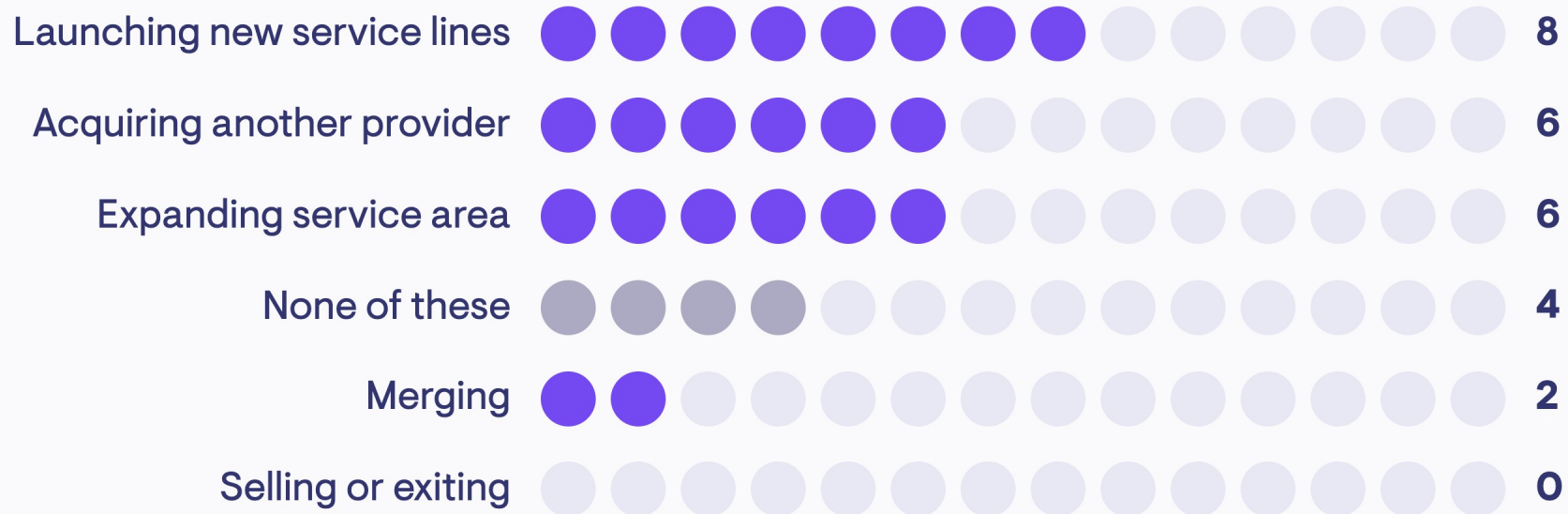
Onboarding, offboarding and acquisition sit at the bottom of both lists.

Technology is the investment lens for the next 12 months



AI sits close behind at 4.00. Leaders see AI as part of a wider digital story, not a stand-alone project.

10 of 14 leaders have a growth move on the table



New service lines and consolidation lead. Nobody is selling or exiting.

Confident on Support at Home. RCTI is still new to most.

SAH ADAPTATION

4.07

out of 5 on average

11 of 14 rate their adaptation 4 out of 5.

OCT 2026 READINESS

4.14

out of 5 on classification

8 of 14 at 5 out of 5. Most leaders feel ready for October's classification changes.

RCTI AWARENESS

9

of 14 not familiar with it yet

3 have considered recipient-created tax invoices, and 2 already use them with most suppliers.

“The biggest opportunity for home care providers over the next three years is to streamline processes, reduce duplication, better understand and use their data, and capitalise on growth opportunities such as CHSP expansion.”

Shey Schillaci, CEO, Benetas

“Ability to tap into the 78k available Support at Home places to expand our client base.”

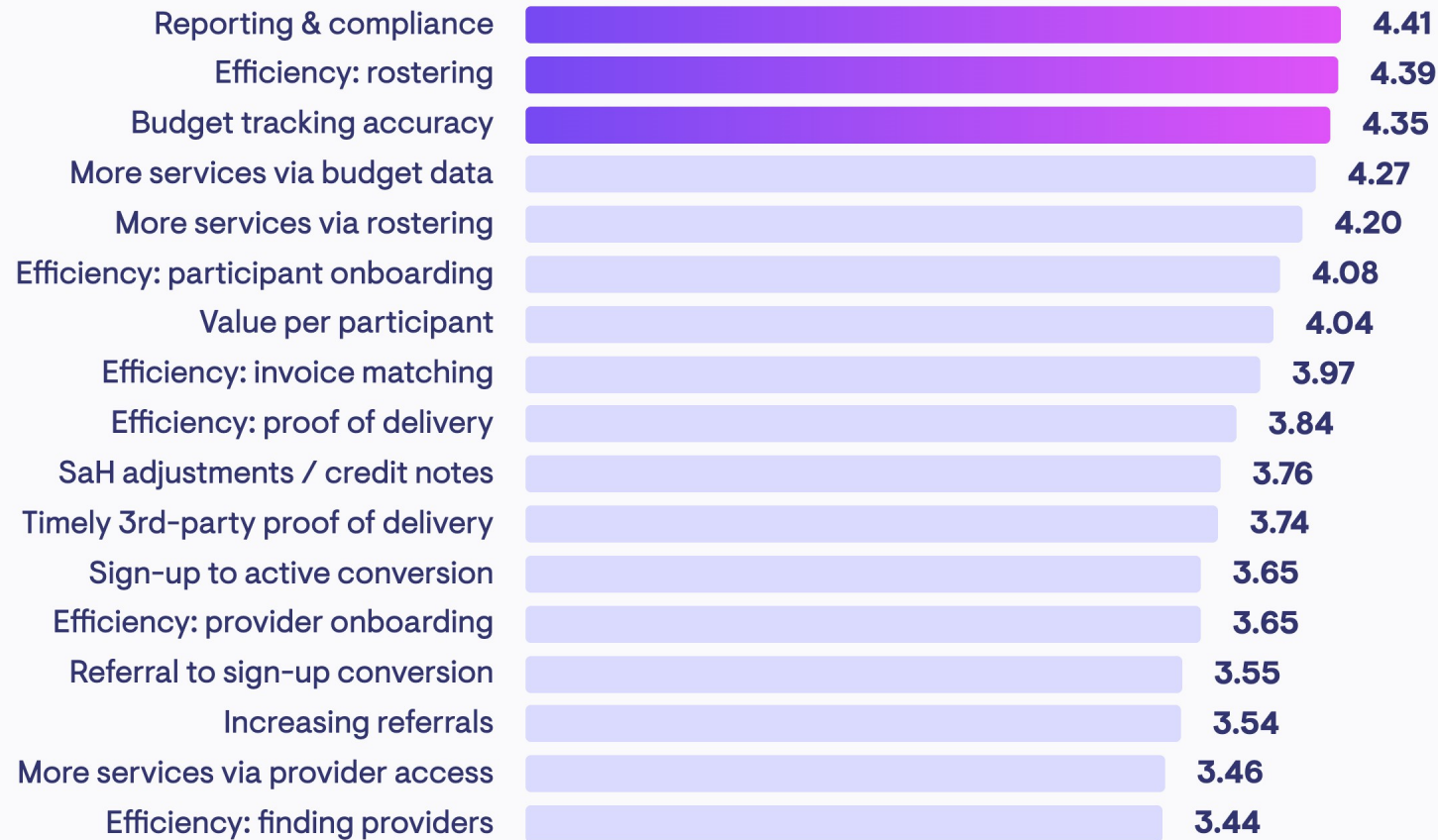
Alma Tuazon, Spectrum Migrant Resource Centre

02

What operational teams told us

126 care managers, finance, rostering, IT and operations staff rated 17 priorities and told us the one thing they wish their software did.

17 priorities, all above the midpoint



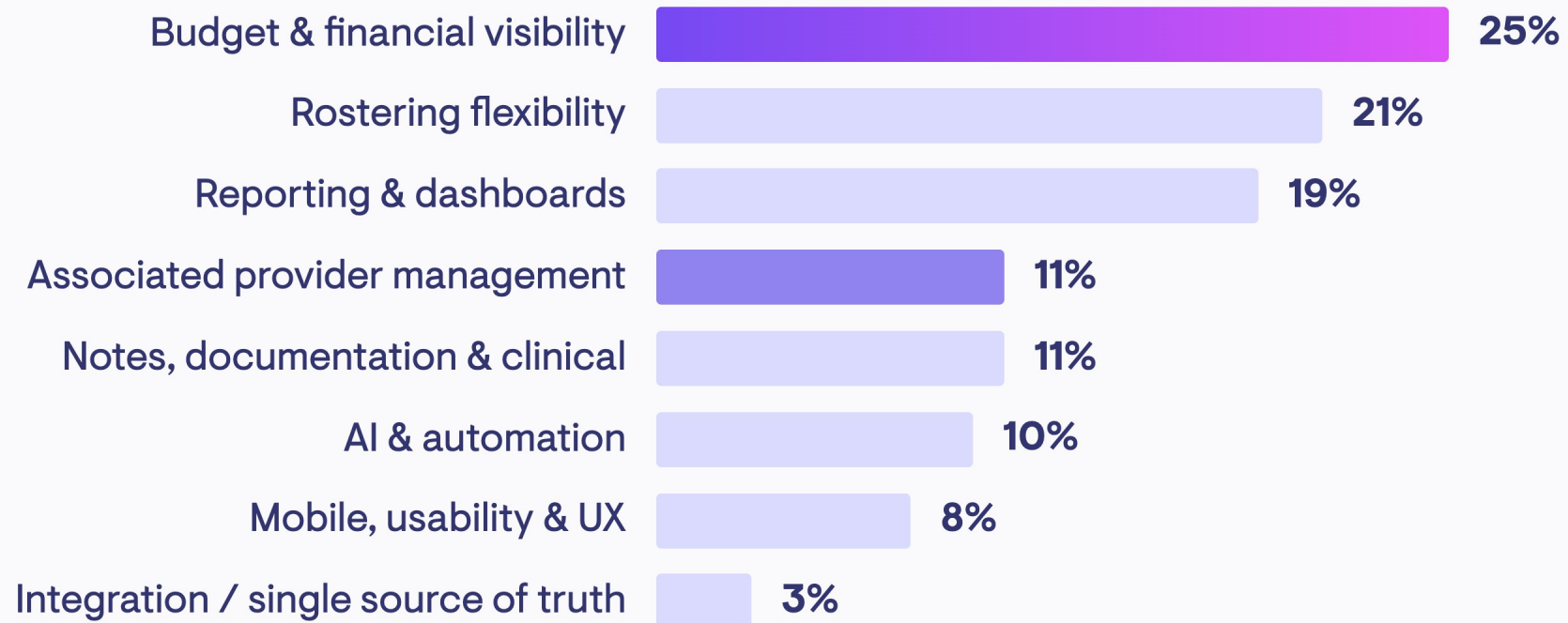
TOP 3

Reporting, rostering
and budget tracking,
all within 0.06 of
each other

BOTTOM

Finding and accessing
providers, and
referral growth

What you wish the software did: 1 in 4 asked for budget visibility



Software that tells you where to look

“These 12 clients need review this week. These 8 clients are approaching budget exhaustion. A dashboard that says: these are the 20 clients that need your attention today, why, and what we recommend.”

Matthew Walton, Operations Manager, Manning Support Services

03

How it differs by role and size

The same pain shows up differently depending on where you sit. See how your peers compare.

Finance lives in the budget. Rostering leads live in the roster.

Role	n	Budget tracking	Invoice matching	Proof of delivery	Rostering efficiency
Finance	10	5.00	4.33	3.67	4.33
Operations manager	14	4.86	4.36	4.29	4.71
IT / systems	6	4.67	4.67	3.67	4.50
Clinical / care manager	31	4.61	4.07	3.86	4.57
Other	45	3.98	3.88	3.90	3.95
Rostering / workforce lead	18	3.89	3.22	3.39	4.83

Budget tracking doesn't split by size. Rostering does.

Members	n	Budget tracking	Invoice matching	Rostering efficiency
Under 100	11	4.50	4.12	4.89
101–250	27	4.39	3.91	4.55
251–500	20	4.41	3.88	4.47
501–1,000	30	4.31	4.15	4.12
1,000+	52	4.30	3.88	4.35

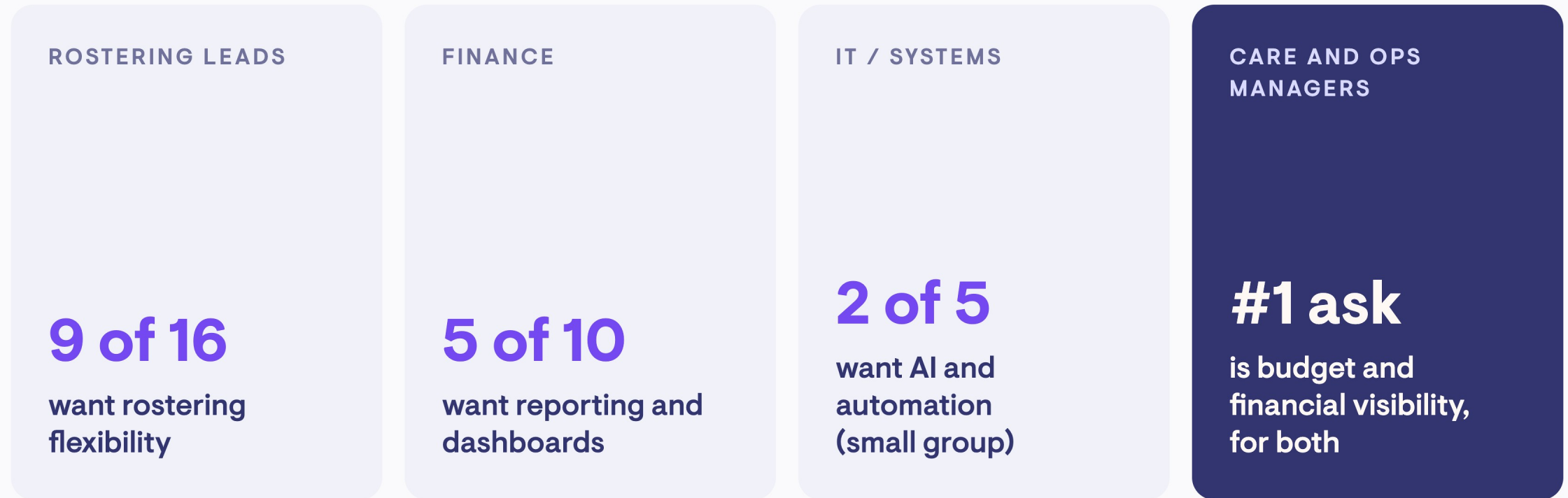
4.30–4.50

Budget tracking at every size band. It's universal, not a scale issue.

4.89

Rostering efficiency peaks for the smallest providers, and dips to 4.12 at 501–1,000.

Every role asks for help with its own day job



Each role wants help where its own day gets hardest. That's where software has to earn its place.

What we heard

01

Budget visibility is everyone's pain

Leaders and frontline teams, every role and every size of provider.
Under Support at Home, seeing the money clearly comes first.

02

Associated providers are a growing load

Leaders' #2 time-cost and #2 priority, and 1 in 9 wishlist answers.
Single-provider accountability is being felt.

03

Technology is where leaders will invest

4.71 out of 5, ahead of workforce and brand, with AI seen as part of
that wider digital story.

04

Teams want to run today better

Reporting, rostering and budget tracking outrank referrals and
growth. Leaders are planning to grow; teams need the foundations
to hold.

What we're going to do with it

PRODUCT AND PLANNING

“When 1 in 4 of you name the same problem, that shapes what our product teams look at next.”

Tate Johnson, Chief Technology Officer · [draft quote](#)

- ✓ Shared with our product and engineering teams as an input to how we plan
- ✓ Read alongside what you already tell us through support, feedback and account conversations
- ✓ The themes you raised, from budget visibility to rostering, now sit in our planning conversations

SUPPORT AND SERVICE

“Your answers help the people who support you understand what your teams are dealing with right now.”

Kate Parkin, Chief Customer Officer · [draft quote](#)

- ✓ Shared with our Customer Success, support and training teams
- ✓ Used to shape the guidance and resources we share with you through Support at Home
- ✓ We'll keep asking, and keep sharing what we hear

Questions about these findings?

[Talk to your Customer Success Manager](#)