

Early Market Intelligence

*Medicare Data for Market Analysis
(Medicare Certified Home Health)*



Early Market Intelligence

Medicare Data for Market Analysis (Medicare-Certified Home Health)

The Market

Counties of: Sampleton and Exampledonia, IA

Most Current Data Set:

12-Month Period Ending September 30, 2013

Number of Agencies: 12

Median Agency Size: 369*

Market Size: 5,642*

Change in Market Size: +5.93%*

*In annual Title XVIII patients. That includes Medicare, Medicaid, and Medicare Advantage. That excludes private insurance, the VA, and private pay.

Why Leading Home Health Agencies Analyze Their Markets:

- Success is relative, and a rising tide raises all ships. The only way to know if your marketing strategy is truly successful is to know the movement of your market. For instance, suppose an agency is growing by 0% per year. One may want to completely change the marketing strategy. However, market analysis might show you that doctors in that area are making fewer home health referrals and that most agencies in that market have lost referrals. If the market is shrinking but one agency is staying the same, that agency is actually gaining in market share. In this case, the marketing strategy may be working in important ways. Changing its strengths would have been a mistake. Evaluating your marketing success requires an understanding of market share.
- When you know how many referrals your competitors are getting (in other words, how many referrals you are not getting), you can better predict the possible gains from different marketing strategies.
- Some marketing strategies don't work, some get a lot of attention, and a few generate referrals. If you are planning to copy or counter the marketing strategy of a competitor, it is helpful to also evaluate if the competitor's strategy is actually generating referrals or just generating a lot of attention.
- Leading agencies must be prepared to defend themselves against agencies that are rapidly grabbing market share. Without the actual data in hand, administrators often guess incorrectly about which competitors are growing and which ones are shrinking. Marketing directors must investigate the strengths of successful competitors, but first, they must know which agencies have strengths that are working as compared to which agencies are just making noise.
- Knowing your market can reveal important advertising opportunities. If your agency is the number one agency in the county, this can be worth advertising in some situations.

About Brazzell's Early Market Intelligence

Brazzell's Early Market Intelligence provides the most timely market share assessment available in the home health industry. In years past, the most current data available was 18 to 30 months old at the time of reporting. Early Market Intelligence cuts your wait time by a year or more. This empowers you to perform much more responsive market analysis.

Brazzell's Early Market Intelligence also provides data from more than one time period. This gives managers an immediate ability to estimate whether the market is growing or shrinking and whether individual competitors are growing or shrinking.

Notice that 12-month time periods advance each quarter. Therefore, two adjacent time periods will have 75% overlap. Comparing two adjacent time periods is essentially comparing the most current quarter to the matching quarter of the previous year.

Brazzell's Early Market Intelligence uses very new data streams from CMS to estimate the census of Medicare-certified home health agencies. The census estimates for each agency are not exact counts but mathematical probabilities based on associated data that can be drawn from CMS data sources. In testing, our system has shown accuracy within a standard deviation of a 15% margin when the estimate specificity rating is high.

The census estimate for each agency has a sensitivity rating of low, moderate or high. In Early Market Intelligence, 88% of agencies nationwide have high specificity estimates. The agencies with low specificity estimates are the top 8% largest home health agencies in the nation. Limitations in the data streams used to create early estimates may cause the largest home health agencies to have an estimated 12-month census that is understated, or the estimates may be very accurate. Inaccurate estimates for the largest agencies will have a tendency to show a 12-month census around 900 even when the census is much larger. When analyzing the data for your market, it is better to look at agencies with low specificity ratings and simply recognize them as national leaders in census which probably have at least the estimated census shown.

Early Market Intelligence also shows a market share rating. This is calculated by dividing the agency's estimated census by the sum of census estimates for all agencies shown in your report.

These shares might also be thought of as ratings with zero as the lowest and 100 as the highest possible score representing a complete monopoly. Even when the estimate specificity is low or moderate, movement in the market share number can be considered as a fairly reliable indicator of actual market changes. For instance, when the market share changes from 4% in one 12-month period to 6% in the next, this movement is more likely to be due to actual changes in your marketplace than due to variability in the estimates.

Individual reports of Early Market Intelligence list all agencies that Medicare shows as located in the market. The market is defined by the user when ordering a report and listing counties. The report does not list agencies who may have patients in the area but who are located outside the area. The report lists one agency per provider number.

The census estimates shown are for Title XVIII patients only. That means patients who are Medicare, Medicaid, and/or Medicare Advantage beneficiaries. Early Market Intelligence does not reflect census from private insurance, Veterans Administration benefits, or private pay patients.

©2014 Brazzell Marketing Agency, Inc.
All Rights Reserved

Brazzell Marketing Agency
Galax, VA
www.BrazzellMarketing.com

Send questions to
Results@BrazzellMarketing.com

REGIONAL MED HOME HEALTH

Change in Census: 5%

101 SAMPLE STREET
EXAMPLE CITY, IA 32174
County: SAMPLETON
Phone: (866) 272-3799
Provider #: 00000X

Ownership: Hospital Based Program
Certified Since: 5/9/2011
Estimate Specificity: Low

12 Months Ending March 31, 2013

Market Share: 27%
Estimated Census: 1420

12 Months Ending June 30, 2013

Market Share: 27%
Estimated Census: 1393

12 Months Ending September 30, 2013

Market Share: 26%
Estimated Census: 1485

VISITING NURSE ALLIES

Change in Census: 1%

101 SAMPLE STREET
EXAMPLE CITY, IA 32117
County: SAMPLETON
Phone: (866) 272-3799
Provider #: 00000X

Ownership: Official Health Agency
Certified Since: 10/20/2005
Estimate Specificity: Moderate

12 Months Ending March 31, 2013

Market Share: 17%
Estimated Census: 882

12 Months Ending June 30, 2013

Market Share: 17%
Estimated Census: 876

12 Months Ending September 30, 2013

Market Share: 16%
Estimated Census: 892

NATIONAL HOME HEALTH ASSOCIATES

Change in Census: -14%

101 SAMPLE STREET
EXAMPLE CITY, IA 32117
County: SAMPLETON
Phone: (866) 272-3799
Provider #: 00000X

Ownership: Local
Certified Since: 5/16/1996
Estimate Specificity: Moderate

12 Months Ending March 31, 2013

Market Share: 19%
Estimated Census: 1000

12 Months Ending June 30, 2013

Market Share: 18%
Estimated Census: 940

12 Months Ending September 30, 2013

Market Share: 15%
Estimated Census: 856

Census estimates only include Medicare, Medicaid, and Medicaid Advantage admissions.

Estimated census of zero suggests a 12-month census between 0 and 59. Estimates with low specificity may show a census around 900 even when the actual census may have been much higher.

Market share reflects percentage of total census for all agencies located in user-defined market.

ORTHOPAEDIC HOME HEALTH

Change in Census: 1%

101 SAMPLE STREET
EXAMPLE CITY, IA 32119
County: SAMPLETON
Phone: (866) 272-3799
Provider #: 00000X

Ownership: Local
Certified Since: 3/22/2012
Estimate Specificity: High

12 Months Ending March 31, 2013

Market Share: 15%
Estimated Census: 777

12 Months Ending June 30, 2013

Market Share: 15%
Estimated Census: 770

12 Months Ending September 30, 2013

Market Share: 14%
Estimated Census: 783

ADULT HEALTH CARE

Change in Census: -8%

101 SAMPLE STREET
EXAMPLE CITY, IA 32119
County: SAMPLETON
Phone: (866) 272-3799
Provider #: 00000X

Ownership: Local
Certified Since: 9/15/2005
Estimate Specificity: High

12 Months Ending March 31, 2013

Market Share: 8%
Estimated Census: 427

12 Months Ending June 30, 2013

Market Share: 8%
Estimated Census: 400

12 Months Ending September 30, 2013

Market Share: 7%
Estimated Census: 394

COUNTY CARE AT HOME

Change in Census: 15%

101 SAMPLE STREET
EXAMPLE CITY, IA 32115
County: SAMPLETON
Phone: (866) 272-3799
Provider #: 00000X

Ownership: Local
Certified Since: 10/13/2006
Estimate Specificity: High

12 Months Ending March 31, 2013

Market Share: 6%
Estimated Census: 322

12 Months Ending June 30, 2013

Market Share: 7%
Estimated Census: 356

12 Months Ending September 30, 2013

Market Share: 7%
Estimated Census: 371

Census estimates only include Medicare, Medicaid, and Medicaid Advantage admissions.

Estimated census of zero suggests a 12-month census between 0 and 59. Estimates with low specificity may show a census around 900 even when the actual census may have been much higher.

Market share reflects percentage of total census for all agencies located in user-defined market.

HEAVENLY EXAMPLE NAME CARE

Change in Census: 100%

101 SAMPLE STREET
EXAMPLE CITY, IA 32174
County: EXAMPLEDONIA
Phone: (866) 272-3799
Provider #: 00000X

Ownership: Official Health Agency
Certified Since: 3/22/2012
Estimate Specificity: High

12 Months Ending March 31, 2013

Market Share: 0%
Estimated Census: 0

12 Months Ending June 30, 2013

Market Share: 0%
Estimated Census: 0

12 Months Ending September 30, 2013

Market Share: 7%
Estimated Census: 367

GREAT CHOICE HOME CARE

Change in Census: -3%

101 SAMPLE STREET
EXAMPLE CITY, IA 32164
County: EXAMPLEDONIA
Phone: (866) 272-3799
Provider #: 00000X

Ownership: Local
Certified Since: 9/15/2005
Estimate Specificity: High

12 Months Ending March 31, 2013

Market Share: 6%
Estimated Census: 300

12 Months Ending June 30, 2013

Market Share: 6%
Estimated Census: 300

12 Months Ending September 30, 2013

Market Share: 5%
Estimated Census: 292

SAM HOUSTON HOME CARE

Change in Census: 2%

101 SAMPLE STREET
EXAMPLE CITY, IA 32763
County: EXAMPLEDONIA
Phone: (866) 272-3799
Provider #: 00000X

Ownership: Local
Certified Since: 10/13/2006
Estimate Specificity: High

12 Months Ending March 31, 2013

Market Share: 4%
Estimated Census: 198

12 Months Ending June 30, 2013

Market Share: 4%
Estimated Census: 193

12 Months Ending September 30, 2013

Market Share: 4%
Estimated Census: 202

Census estimates only include Medicare, Medicaid, and Medicaid Advantage admissions.

Estimated census of zero suggests a 12-month census between 0 and 59. Estimates with low specificity may show a census around 900 even when the actual census may have been much higher.

Market share reflects percentage of total census for all agencies located in user-defined market.

LOCAL HOMETOWN HEALTH CARE

Change in Census: 0%

101 SAMPLE STREET
EXAMPLE CITY, IA 32725
County: EXAMPLEDONIA
Phone: (866) 272-3799
Provider #: 00000X

Ownership: Local
Certified Since: 5/9/2011
Estimate Specificity: High

12 Months Ending March 31, 2013

Market Share: 0%
Estimated Census: 0

12 Months Ending June 30, 2013

Market Share: 0%
Estimated Census: 0

12 Months Ending September 30, 2013

Market Share: 0%
Estimated Census: 0

PLYMOUTH DEPENDABLE HOME CARE

Change in Census: 0%

101 SAMPLE STREET
EXAMPLE CITY, IA 32114
County: EXAMPLEDONIA
Phone: (866) 272-3799
Provider #: 00000X

Ownership: Local
Certified Since: 12/26/2012
Estimate Specificity: High

12 Months Ending March 31, 2013

Market Share: 0%
Estimated Census: 0

12 Months Ending June 30, 2013

Market Share: 0%
Estimated Census: 0

12 Months Ending September 30, 2013

Market Share: 0%
Estimated Census: 0

UP AND COMING HOME HEALTH

Change in Census: 0%

101 SAMPLE STREET
EXAMPLE CITY, IA 32713
County: EXAMPLEDONIA
Phone: (866) 272-3799
Provider #: 00000X

Ownership: Local
Certified Since: 1/27/2011
Estimate Specificity: High

12 Months Ending March 31, 2013

Market Share: 0%
Estimated Census: 0

12 Months Ending June 30, 2013

Market Share: 0%
Estimated Census: 0

12 Months Ending September 30, 2013

Market Share: 0%
Estimated Census: 0

Census estimates only include Medicare, Medicaid, and Medicaid Advantage admissions.

Estimated census of zero suggests a 12-month census between 0 and 59. Estimates with low specificity may show a census around 900 even when the actual census may have been much higher.

Market share reflects percentage of total census for all agencies located in user-defined market.