

Huynh, P., Stöckli, S., Fleisch, E., Kowatsch, T., & Vinay, R. (2025). Technological integration and business models of leading home care providers for older adults: A systematic market analysis and multiple case study [Poster presentation, Submission No. 89327]. IAFOR The Asian Conference on Aging & Gerontology (AGen). Tokyo, Japan.

Abstract:

Socioeconomic progress over the past half-century has coincided with declining birth rates and rising lifespans, accelerating global population aging. Consequently, over 142 million older adults struggle to meet their necessities, increasing their dependence on caregiving. While most prefer to age at home, a significant caregiver shortage poses challenges. The growing demand for home care emphasizes the need for innovative, scalable business models. Research Questions: (1) Who are the leading home care providers? (2) What business models are employed? (3) What technologies are used in home care. We conducted a global market analysis of countries with high Global Innovation Index and aging populations, selecting Singapore, Sweden, Switzerland, the UK, and the US. For each country, we identified leading home care providers through governmental databases focusing on revenue, clients, and operational regions. We utilized the Business Model Canvas and conducted interviews to assess these providers. Our study systematically identified the leading providers in the home care industry across selected countries. Our findings indicate that providers use diverse business models, resulting in changes in operations, value capture, and value creation and delivery. We analyzed a range of technologies in use, notably operational and clinical software, along with care support tools. Our study elucidates the design and adoption of emerging business models in home care, providing valuable insights for researchers and practitioners to optimize care delivery. We advocate for empirical research on these models and further investigation into partnering strategies and the adaption of technology within home care ecosystems.