

Long-Term Care Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029

Segmented By Service (Home healthcare, Hospice & Palliative Care, Nursing care, Assisted living facilities, Others), By Payer (Public, Private, Out of Pocket), By Region and Competition, 2019-2029F

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Abstracts

Global Long-term Care Market was valued at USD 1.03 Trillion in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.72% through 2029. This can be ascribed to the growing aging population are more susceptible for communicable and non-communicable diseases which needs home healthcare services along with growing acceptance of services such as home-based diagnosis, long term care services. Similarly, growing demand for technological advanced product such as mobile applications, wearables, trackers, smart alarms are anticipated to drive the growth of Global Long-term Care market over the years. Also, innovations such as telemedicine, remote monitoring systems, and assistive devices are transforming the delivery of long-term care. These innovations not only improve efficiency but also enhance patient outcomes, thereby influencing the demand for long-term care market. There is a growing preference among older adults to receive care in their own homes rather than in institutional settings. This preference is driving the expansion of home care services, including home health aides, personal care attendants, and skilled nursing care provided in home settings.

Key Market Drivers

Growing Prevalence of Chronic Diseases

The growing prevalence of chronic diseases has a significant influence on the growth of the global long-term care market. Chronic diseases often require ongoing management, specialized care, and assistance with daily activities. As the prevalence of chronic diseases rises, there is a greater demand for long-term care services to support individuals with these conditions. Long-term care facilities, home healthcare agencies, and caregivers play a crucial role in providing the necessary support and services to individuals with chronic diseases. Individuals with chronic diseases may require ongoing medical supervision, medication management, rehabilitation, and assistance with activities of daily living, which are often provided by long-term care providers. Many chronic diseases require specialized care, such as dementia care, palliative care, or post-stroke rehabilitation. Long-term care providers, including nursing homes, assisted living facilities, and home healthcare agencies, offer specialized services tailored to the specific needs of individuals with chronic conditions. The growing prevalence of chronic diseases drives the demand for these specialized care services, leading to the expansion of the long-term care market.

The increasing prevalence of chronic diseases necessitates additional support for caregivers, including respite care, counseling, training, and access to professional services. This support may be provided through long-term care facilities or home healthcare agencies, contributing to the growth of the long-term care market. The management of chronic diseases often requires a coordinated approach that integrates healthcare and long-term care services. As the prevalence of chronic diseases grows, there is a greater emphasis on care continuity and care coordination across different settings, such as hospitals, primary care clinics, and long-term care facilities. This integration drives the collaboration between healthcare and long-term care providers, leading to the expansion of the long-term care market.

Growing Technological advancements

Technological advancements play a crucial role in driving the growth of the global long-term care market. Technological innovations enable remote monitoring of patients' health conditions and the delivery of care through telehealth platforms. Remote monitoring devices, wearable sensors, and mobile applications allow healthcare providers to track vital signs, medication adherence, and disease progression from a distance. Telehealth consultations provide access to healthcare professionals without the need for in-person visits. These technologies improve access to care, enhance patient convenience, and facilitate early intervention, which are particularly beneficial for individuals receiving long-term care. Assistive technologies, such as mobility aids, communication devices, and smart home systems, enhance independence and safety

for individuals receiving long-term care. These technologies help with activities of daily living (ADLs), such as bathing, dressing, eating, and mobility. They also include fall detection systems, automated medication dispensers, and voice e-controlled devices that assist in managing healthcare needs. The integration of assistive technologies into long-term care services improves quality of life, promotes aging in place, and reduces the need for institutional care.

Electronic health records streamline the documentation, storage, and sharing of patient health information among healthcare providers. EHR systems in long-term care facilities enable seamless communication and care coordination between different healthcare professionals involved in a patient's care, including physicians, nurses, therapists, and caregivers. EHRs improve information accuracy, reduce paperwork, and facilitate the exchange of critical health data, ensuring continuity and quality of care for individuals in long-term care settings. Technology has revolutionized medication management in long-term care settings. Automated medication dispensers and electronic medication administration records (eMARs) improve medication safety, adherence, and tracking. These systems help prevent medication errors, ensure timely administration, and provide real-time alerts for missed doses or drug interactions. By enhancing medication management, technology contributes to better health outcomes and reduces the risk of adverse events in long-term care.

Robotic devices and artificial intelligence (AI) are increasingly being utilized in long-term care settings. Robots can assist with lifting and transferring individuals, reducing the physical strain on caregivers. AI algorithms can analyze large datasets and provide insights for personalized care plans, predictive analytics, and early detection of health deterioration. Additionally, AI-powered chatbots and virtual assistants offer 24/7 support, answering basic health-related queries and providing information to patients and their families. The integration of data analytics and population health management tools enables long-term care providers to analyse large datasets, identify trends, and proactively manage the health of their populations. By leveraging big data, predictive analytics, and machine learning algorithms, healthcare organizations can optimize care delivery, identify high-risk individuals, and implement preventive interventions. These technologies drive efficiency, improve care outcomes, and reduce healthcare costs in the long-term care sector.

Government Initiatives Policies

Government initiatives and policies have a significant impact on driving the growth of the global long-term care market. Governments play a crucial role in providing financial

support and investment in the long-term care sector. They allocate budgets and funds to enhance the availability and accessibility of long-term care services. Increased funding enables the expansion of infrastructure, the recruitment and training of healthcare professionals, and the development of innovative care models. Government investment stimulates market growth and ensures that long-term care services are adequately resourced.

These policies aim to ensure quality standards, patient safety, and equitable access to care. Regulatory frameworks define licensing requirements for long-term care facilities, establish standards for care delivery, and promote transparency and accountability in the sector. By setting clear guidelines and regulations, governments create an environment that supports the growth and development of the long-term care market. Many governments recognize the preference of individuals to age in place, receiving care and support in their own homes rather than in institutional settings. Government initiatives promote home-based care and community-based services, including home healthcare, home modifications, and caregiver support programs. By supporting aging in place, governments drive the growth of the global long-term care market by encouraging the development of home care agencies, technology-enabled services, and community-based care models. Governments often invest in research and development initiatives in the long-term care sector. These initiatives aim to address emerging challenges, promote innovation, and enhance the evidence base for effective care models. By supporting research and development, governments drive advancements in long-term care practices, technologies, and service delivery, fostering market growth and improving the quality of care.

Rising Awareness Demand for Person-Centered Care

Person-centered care prioritizes the individual's preferences, needs, values, and goals, promoting their active participation in decision-making and care planning. As awareness about the benefits of person-centered care increases, there is a growing demand for long-term care services that embrace this philosophy. Individuals and their families seek providers who prioritize their autonomy, dignity, and well-being. This demand drives the growth of the long-term care market by encouraging the development of care models and services that focus on individualized care and engagement. As individuals and families become more aware of the positive impact of person-centered care, they actively seek providers who prioritize these principles. Long-term care providers that adopt person-centered care models and practices attract more clients and contribute to market growth. The aging population, particularly the baby boomer generation, has different expectations and preferences regarding long-term care. Many individuals

desire personalized care that respects their individuality and allows them to maintain their independence and sense of identity. This preference drives the demand for person-centered care services that focus on building relationships, fostering choice, and promoting a person's social, emotional, and spiritual well-being.

Key Market Challenges

Lack of Skilled Workforce

The global demand for long-term care is facing a decline, primarily due to a critical shortage of skilled workforce in the healthcare sector. Long-term care services, which often require specialized skills and a dedicated caregiving workforce, are grappling with a shortage of trained professionals, including nurses, aides, and other healthcare practitioners. This scarcity of skilled personnel hinders the effective delivery of long-term care services, impacting the quality and accessibility of care on a global scale.

The lack of a skilled workforce is particularly pronounced in regions experiencing demographic shifts, where an aging population increases the demand for long-term care services. The complex and demanding nature of caregiving roles requires specialized training, and the shortage of skilled workers poses challenges in meeting the growing needs of individuals requiring long-term care. The global long-term care market response underscores the urgent need for strategic workforce planning, training programs, and policy initiatives to address the shortage of skilled personnel in the long-term care sector. Stakeholders within the healthcare industry are exploring innovative solutions, including technology integration and educational incentives, to attract and retain a skilled workforce, ensuring that long-term care services can meet the evolving demands of a changing demographic landscape.

Rising Costs of Providing Long-Term Care

The global demand for long-term care is witnessing a decrease, largely influenced by the escalating costs associated with providing these services worldwide. The complexities of long-term care, including personalized medical attention, ongoing monitoring, and comprehensive support for individuals with chronic conditions or disabilities, contribute to the rising expenses in the healthcare sector. The demand for long-term care services is closely intertwined with economic considerations, as the increasing costs make these services less accessible to a broader population.

Healthcare providers, insurers, and individuals seeking long-term care are grappling

with the financial implications of these escalating costs, leading to a reassessment of priorities and care options. The global market response underscores the need for innovative financial models, cost-effective care delivery strategies, and policy initiatives to address the economic challenges associated with long-term care. As stakeholders explore avenues for sustainability and affordability, finding a balance between quality care and cost-effectiveness becomes imperative for the long-term care sector to meet the diverse and growing needs of individuals requiring extended healthcare services.

Key Market Trends

Increased Demand for Home Healthcare Services

The global demand for long-term care is witnessing a notable upswing, propelled by the increased demand for home healthcare services worldwide. The growing preference for home-based care solutions is driven by various factors, including an aging population, advancements in medical technology, and the desire for personalized and comfortable care environments. As individuals seek to age in place and manage chronic conditions from the comfort of their homes, the demand for long-term care services has become increasingly synonymous with the rise in home healthcare.

Long-term care encompasses a range of services, from assistance with daily activities to complex medical interventions, and its demand is escalating in tandem with the broader trend of healthcare decentralization. Home healthcare services play a pivotal role in meeting this demand, providing a range of care options tailored to individuals' specific needs. The global market response underscores the transformative shift in healthcare delivery, with long-term care services evolving to align with the preferences and requirements of individuals and their families. As the demand for home healthcare services continues to rise, the need for comprehensive and adaptable long-term care solutions on a global scale becomes increasingly crucial.

Rise of Telehealth

The global demand for long-term care is experiencing a significant surge, largely attributed to the rise of telehealth services that are transforming the healthcare landscape worldwide. Telehealth, encompassing virtual consultations, remote monitoring, and digital health platforms, has become a pivotal component in the delivery of long-term care. This paradigm shift in healthcare delivery is driven by factors such as technological advancements, increased connectivity, and the need for accessible and convenient healthcare options.

Telehealth has proven instrumental in extending long-term care services to individuals in their homes, facilitating remote consultations with healthcare professionals, and enabling continuous monitoring of patients with chronic conditions. The demand for long-term care is closely intertwined with the expansion of telehealth, as it offers a scalable and efficient means to provide ongoing medical support, manage chronic illnesses, and enhance overall patient outcomes.

The global market response reflects the transformative impact of telehealth on long-term care, with stakeholders recognizing the potential for increased accessibility, improved patient engagement, and cost-effective solutions. As telehealth continues to shape the future of healthcare delivery, the demand for long-term care is set to escalate, marking a dynamic shift in how healthcare services are accessed and delivered on a global scale.

Segmental Insights

Service Insights

Based on service, the home healthcare segment dominated the Global Long-term Care Market in 2023. This is largely due to the convenience and comfort it provides to patients, allowing them to receive care within their familiar environments. The proliferation of advanced technologies in home healthcare is also contributing to its increasing dominance in the market. However, other sectors like Hospice Palliative Care, Nursing care, assisted living facilities, and others still play significant roles.

Payer Insights

Based on the Payer segment, in the landscape of healthcare services, the public sector dominated the market in 2023. Public sector plays a significant and influential role. Governments across the globe are putting their attention and resources into the provision of high-quality, easily accessible, and affordable long-term care services. This concerted effort is primarily fuelled by two key factors, the increasing number of elderly individuals in society and the escalating prevalence of chronic diseases. These factors highlight the crucial societal importance of long-term care and accentuate the pressing need for robust and comprehensive public policies that not only ensure the accessibility of these services but also guarantee their uncompromising quality. By addressing these challenges head-on, the public sector is actively striving to meet the evolving healthcare needs of individuals and communities alike, while also reinforcing the fundamental

principle of equitable and inclusive care for all.

Regional Insights

The North America region is currently dominates in the Global Long-term Care Market, primarily driven by the rapidly aging population and the comprehensive long-term care infrastructure in countries such as the United States and Canada. The presence of favorable government policies, including financial support for long-term care services and initiatives to improve accessibility, has further propelled the growth of the long-term care market in this region. Additionally, the availability of advanced healthcare facilities, state-of-the-art medical technologies, and a highly skilled workforce have played a significant role in meeting the increasing demand for long-term care services. With ongoing research and development efforts, as well as collaborations between healthcare providers and technology companies, the North American region is poised to maintain its leading position in the Global Long-term Care Market for the foreseeable future.

Key Market Players

Brookdale Senior Living Inc.

Sunrise Senior Living (Red Fox Holding Corporation)

Kindred Healthcare (Knight Health Holdings, LLC)

Genesis Healthcare, Inc.

Extendicare Inc.

Capital Senior Living Corporation

Diversicare Healthcare Services, Inc.

Home Instead, Inc.

Senior Care Centers, LLC

Atria Senior Living, Inc.

Report Scope:

In this report, the Global Long-term Care Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Long-term Care Market,By Service:

- oHome healthcare

- oHospice Palliative Care

- oNursing care

- oAssisted living facilities

- oOthers

Long-term Care Market,By Payer:

- oPublic

- oPrivate

- oOut of Pocket

Long-term Care Market, By Region:

- oNorth America

 - United States

 - Canada

 - Mexico

- oEurope

 - France

United Kingdom

Italy

Germany

Spain

oAsia-Pacific

China

India

Japan

Australia

South Korea

oSouth America

Brazil

Argentina

Colombia

oMiddle East Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Long-term Care Market.

Available Customizations:

Global Long-term Care market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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