

Building The Caregiving Workforce

Our Aging World Needs



The Global Coalition on Aging's (GCOA) 2018 report, [Relationship-Based Home Care: A Sustainable Solution for Europe's Elder Care Crisis](#), articulated the value provided by skilled professional caregivers. These trained and paid professionals deliver care defined by and tailored to the needs of older individuals, focused on care outcomes instead of a predetermined checklist of tasks.

The report called for integrating this relationship-based home care model into health and social care ecosystems worldwide. An example of such progress is in Australia, where the Royal Commission Into Aged Care Quality and Safety Counsel issued its report following a two-year inquiry into the future of care in Australia. Its final submission states:



Support and care in the home will be the norm for aged care, through to the end of life. Wherever care is delivered, it should be personal and relationship-based rather than transactional and institutional. All aged care will be well adapted to providing safe, high quality and empathetic dementia care.¹

2021 marks the start of the Decade of Healthy Ageing as declared by the United Nations and World Health Organization. At the top of the Decade's agenda are long-term

care and integrated care, which must be transformed to align with today's and future aging realities and the goal of maintaining functional ability as we age.

For years, Home Instead has been a partner with GCOA on a mission to make society a better place in which to grow older. With this mission comes the recognition that one's home is the preferred and safest place to age and the understanding that our living rooms are the hospitals of the future. However, this care model cannot succeed without a skilled, vibrant, respected and growing caregiving workforce.

To achieve this, we need to elevate caregiving as a career of choice, with high standards set for worker training and the delivery of care. We recognize that supplementing professional care with technology, properly deployed, has great potential to improve care outcomes. Professionalizing and creating a career path for the caregiving workforce will be essential for providing the high-touch and high-tech care needed to foster a sustainable and innovative society that supports our rapidly aging population and fuels the growing silver economy, currently valued at more than \$USD 15 trillion.

Now, in [Building the Caregiving Workforce Our Aging World Needs](#), we zero in on the urgency and necessity of expanding and professionalizing the caregiving workforce. First, we highlight the exploding global demand for elder care—especially home care—in the face of growing shortages of caregivers and the special challenges of COVID-19. Second, we examine barriers to building the caregiving workforce the world needs.

Third, we explore caregiving as a job creation engine in a world where automation and artificial intelligence (AI) are putting millions out of work and millions more jobs are transitioning. Finally, we recommend practical solutions for seizing the opportunity to build a highly respected workforce of professional caregivers on the scale needed to serve today's—and tomorrow's—aging population.

The increasing demand for elder caregiving represents a challenge never before experienced until the 21st century. The solutions must be multi-faceted, requiring collaboration between and among governments, the

private sector, NGOs, and stakeholders across all institutions of society. As the largest provider of home care services around the world and the leading global business voice on the opportunities of aging, Home Instead and GCOA are committed to elevating the dialogue and taking actions that lead to a caregiving workforce that is rewarded and respected for the skilled, professional and essential work provided. We wrote this report because the demand for care is undeniable, but it is up to us to lead the charge by living up to the principles shared within this report. Together we can build the caregiving workforce of the future—the caregiving workforce our aging world needs.



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CAREGIVER TERMINOLOGY

We recognize the term **“caregiver”** is quite broad. There is not one narrow, universally accepted definition of this term. For instance, a caregiver can be a family member, loved one, friend or neighbor. A caregiver can also be a trained professional that is hired or provided to assist with the needs of an individual without the capability to do so for himself or herself. Caregivers can also be identified by the care recipient, as they can provide care to a child, a person with disabilities, or an aging adult. For the purposes of our report, when we refer to the “caregiving workforce,” we are speaking specifically about those whose job it is to care for older adults. We may also refer to them as paid caregivers, professional caregivers or home care workers.



CHAPTER 1:

Wanted: More Caregivers

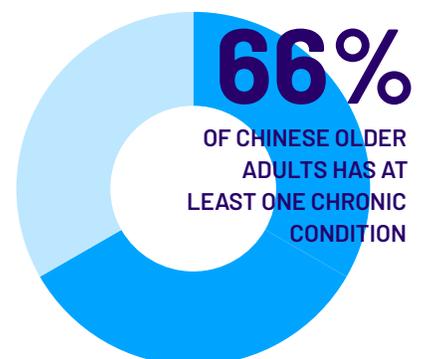
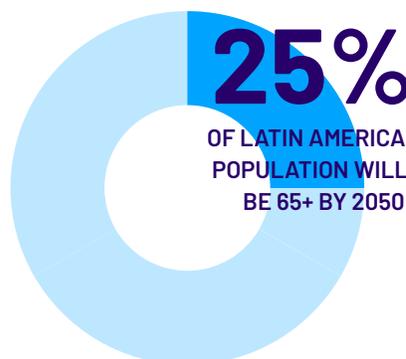
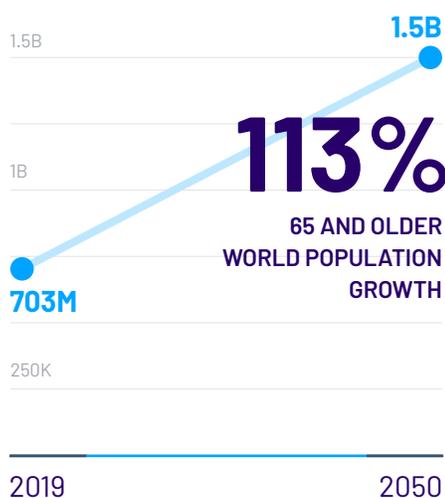
The single most powerful demographic fact of our time is the aging of the world's population. The data is clear and compelling.

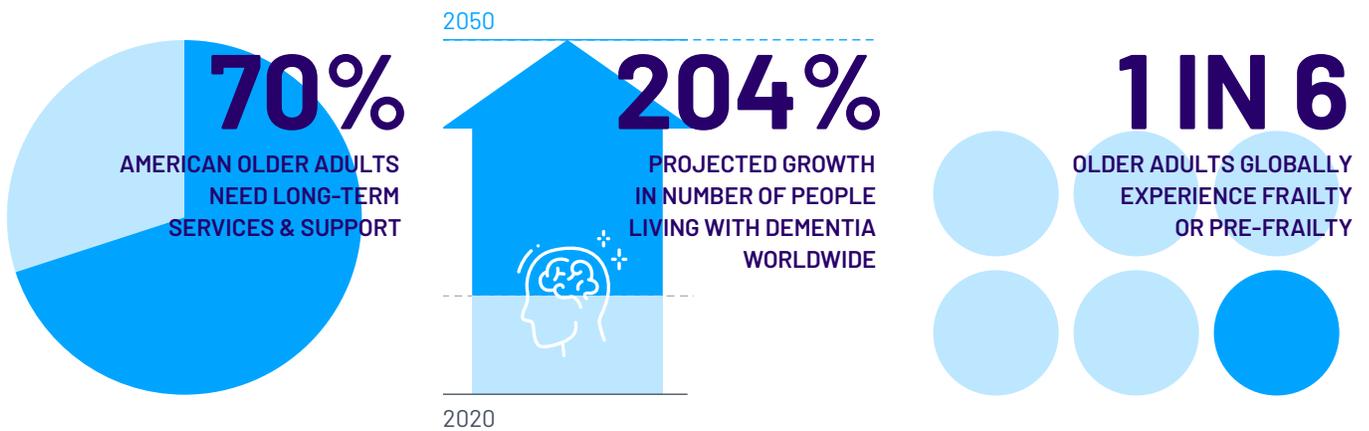
- For the first time in human history, there are more old than young—a trend that will only grow as longevity continues to increase and birth rates decrease.
- The world's 703 million people aged 65 and older as of 2019 will more than double to 1.5 billion by 2050.²
- Even the relatively young region of Latin America is rapidly aging. In 2050, individuals over the age of 65 will make up nearly one-fourth of the total population.³

The miracle of longevity means hundreds of millions of people around the world are living longer, healthier and more productive lives. Yet, longevity also increases the likelihood individuals will someday need assistance with

the tasks of everyday life—or else their health will fall victim to various chronic conditions, such as dementias and frailty, which will require even more intensive and expensive care.

- In China, two-thirds of older adults have at least one chronic condition, such as diabetes, cardiovascular disease, cancer or chronic respiratory disease.⁴ Nearly one quarter of older adults in China need assistance with activities of daily living, such as bathing, dressing, eating and personal hygiene.⁵





- In the United States, 70% of Americans who reach age 65 have severe needs for long-term services and support.⁶

As care needs increase with the aging of the population, how and where care is provided is also changing. According to a recent report from the Organization for Economic Development and Cooperation (OECD), there is a major shift in care settings—from nursing homes and residential care to home care and support for living independently for as long as possible.⁷

- Worldwide, about 50 million people are living with some form of dementia (such as Alzheimer’s disease) —a figure that is projected to reach 82 million by 2030 and 152 million by 2050.⁸

- The global incidence of frailty and pre-frailty among independently living older adults is approximately 1 in 6, and frailty is often associated with adverse health outcomes, including falls, disability, and increased use of health care resources.⁹



There’s always that moment on that first day, when you open the door to walk out and you turn around to look at your client, and they’re sitting there clean, fed, content, and looking forward to seeing you again. That moment is worth the whole thing to me.

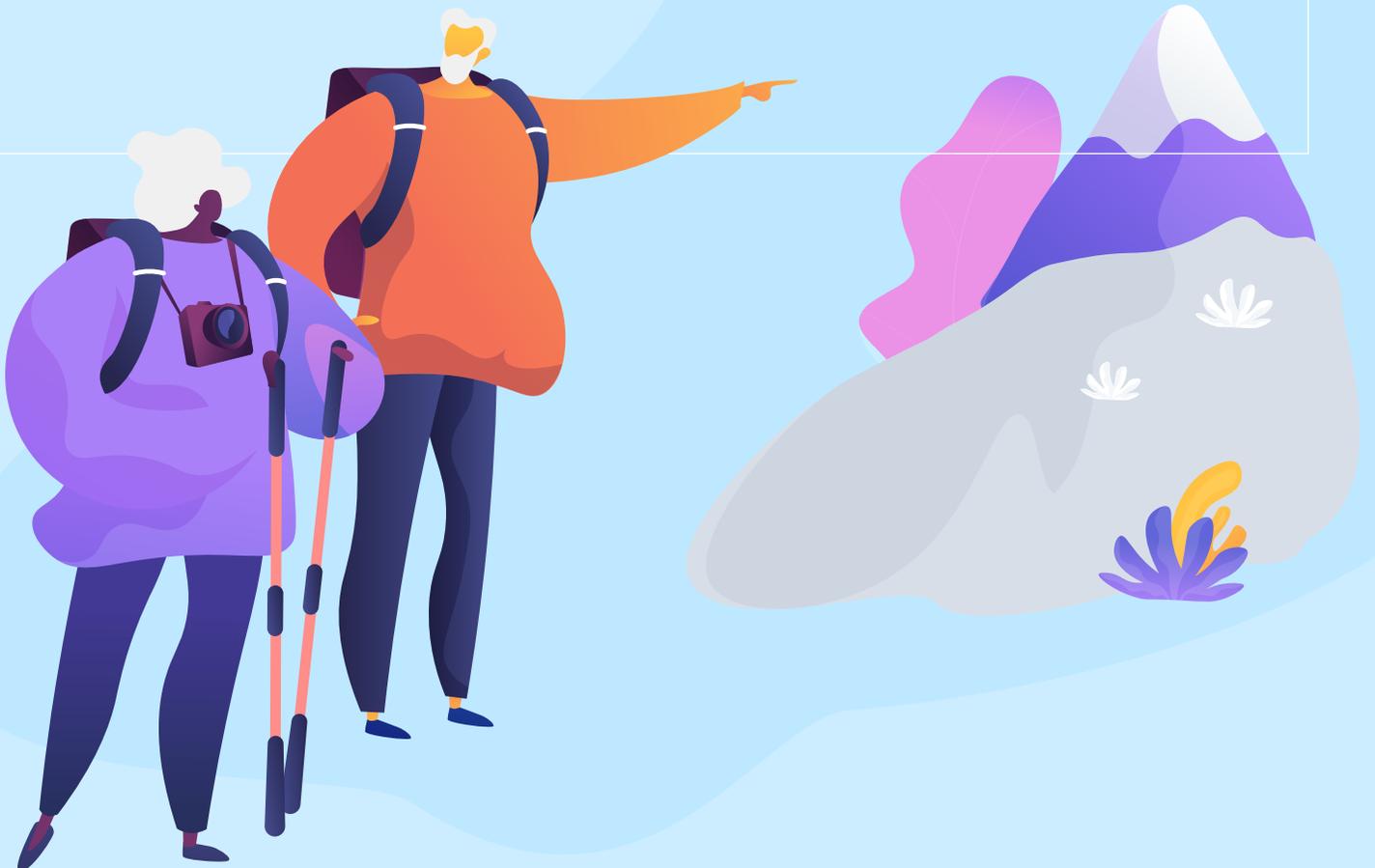
James, Vietnam Veteran and professional caregiver for 15 years, United States



FOCUS ON FRAILITY

Frailty is a clinical syndrome prevalent in older adults and commonly associated with risk for poor health outcomes including falls, hospitalization and mortality.

Frailty is characterized by vulnerability resulting from aging-associated decline in reserve and function—physical and cognitive. Epidemiologists point out that the clinical characteristics of frailty include negative energy balance, sarcopenia, and diminished strength and tolerance for exertion. Some indicators of frailty include low grip strength, low energy, slowed walking speed, low physical activity, and/or unintentional weight loss—all of which can be identified, prevented and/or treated in a pre-frail stage with the right type of person-centered care.¹⁰ According to the World Health Organization (WHO), “Active case finding of older people with frailty is essential for the reorientation of health services to these people’s needs.”¹¹ With more awareness, education and training, a focus on frailty can help mitigate healthcare costs and improve quality of life.



The Growing Caregiver Gap

Unalterable demographic certainties are driving a surge in demand for caregivers. However, at this very moment of growing need, the world is experiencing an acute—and expanding—shortage of professional care workers.

- Across OECD countries, the number of elder care workers will need to increase by 60% by 2040 to maintain the current ratio of caregivers to older people. That is equal to a needed supply of 13.5 million new workers.¹²
- In Germany, need for care increased 34% between 2015 and 2018, with 76% of care taking place in the home.¹³ These needs will continue to grow, and one study projects a current shortfall of 120,000 care workers.¹⁴
- Singapore needs to grow its direct care workforce by 130% over the next 10 years in order to serve its rapidly aging population.¹⁵
- Hong Kong projects it will need an additional 240,000 workers to provide care over the next three decades.¹⁶
- In the United States, a national shortage of 151,000 care workers will exist by 2030, and a 355,000-caregiver shortfall by 2040.¹⁷





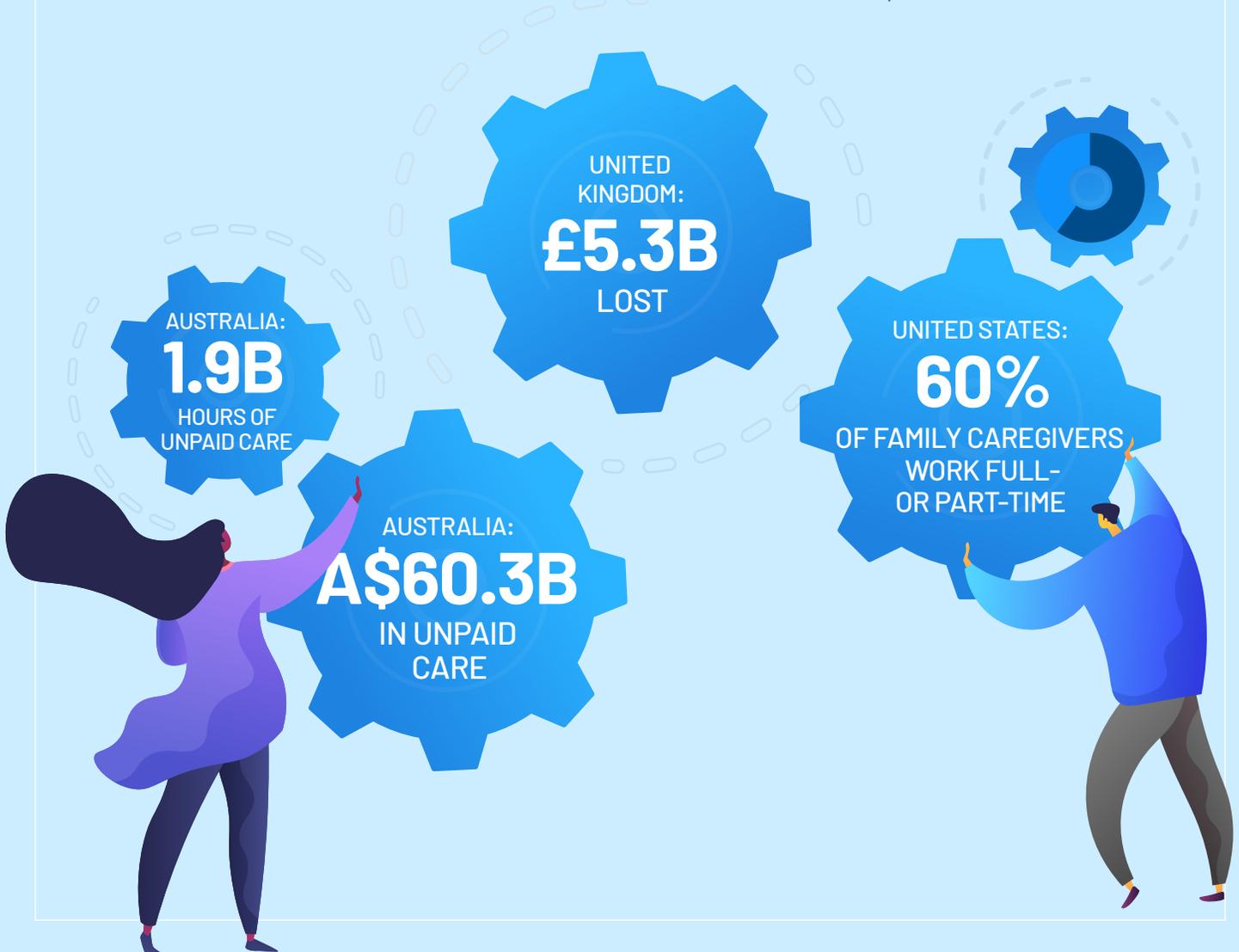
AN UNFAIR BURDEN FOR UNPAID CAREGIVERS

Without a robust professional caregiving workforce, the burden of caring for aging adults will inevitably fall on unpaid, untrained family caregivers.

→ An Australian study found 1.9 billion hours of unpaid care is provided every year, valued at A\$60.3 billion.¹⁸

→ In the United Kingdom, approximately £5.3 billion is lost due to people dropping out of the workforce to care for older or disabled loved ones.¹⁹

→ In the United States, 60% of family caregivers work full- or part-time in addition to their caregiving responsibilities.²⁰



There Is No Place Like Home

While the surging demand for caregivers is being driven by rising longevity, all types of care are not created equal. Evidence indicates that home care is the preferred model of caregiving across a range of indicators.



People want to age in place: Survey data consistently shows that the vast majority of older adults around the world are vocalizing their desire to age at home, rather than move to institutional care or live with family members. An AARP study found that nearly 80% of adults age 50 and older want to remain in their homes as they age—but only about half expect to do so.²¹ In Australia, 75% of older people want to stay in their current home as long as possible, even if they need help to stay at home.²²



Home care is less expensive than institutional care: For all but the sickest and most frail older people, home care is not only the most desirable choice, but also the best financial option. In 2019, the average cost of home care in the United States was less than half the cost of a private room in a nursing home (\$USD 52,000 for 44 hours per week of home care versus \$USD 102,204).²³ In the European Union (EU), the average unit cost of institutional care is 106% of gross domestic product (GDP) per capita, compared to 36% for formal home care.²⁴ Institutional care is the largest public long-term care expenditure in most European countries—a huge cost that is driving unsustainable debt levels. For these reasons and others highlighted in this section, transforming long-term care is a core action area of the Decade of Healthy Ageing.



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Home care is safer than institutional care:

Across OECD countries, nearly half of all COVID-19 deaths happened in care and nursing homes, although less than 1% of people live in those facilities.²⁵ A recent World Economic Forum report, *COVID and Longer Lives: Combating ageism and creating solutions*, emphasizes that home care has long played a critical role within the broader healthcare system, but that “the COVID-19 period has shown that these settings have the potential to significantly buttress healthcare delivery...by ensuring that care can continue while institutional health facilities threaten to be overwhelmed.”²⁶ Home care workers have played a critical role assisting seniors during the pandemic by protecting vulnerable elderly populations from exposure at these overwhelmed hospitals and nursing homes. And further, caregivers who work in individuals’ homes, rather than in institutions, have been better protected from the virus due to the one-on-one—as opposed to one-to-many—nature of home care work.



Governments worldwide are turning to home care as a solution:

Recognizing that home care offers a more sustainable and cost-effective solution, the Chinese government has embraced a goal of delivering 90% of all senior care in the home.²⁷ Similarly, the Irish government’s Sláintecare policy framework seeks to integrate health and social care services, providing the majority of care at or closer to home.²⁸ Yet, like most countries, China and Ireland currently lack the home care workforce needed to achieve these goals.



More home care is possible:

A recent analysis estimates that 25-60% of care given to older people in the Netherlands could be provided at home.²⁹ In Canada, roughly 40% of institutional care residents could go home—if given the right support.³⁰ One study in the United States found that increasing the availability of home care could generate significant Medicare savings, since \$USD 4 billion in Medicare costs result from a lack of non-medical support.³¹



It is the clients who bring joy to my life. My clients are so appreciative that I’m helping them stay in their homes. It’s heartwarming to know you’re helping provide extra meaning to their lives.

Kristin, professional caregiver, Canada

CHAPTER 2:

Closing the Care Gap: More Than a Numbers Game

Closing the gap between supply and demand for home care workers will not be achieved by simply recruiting and training more people. It will also require a dramatic shift in societal understanding of and attitudes toward the caregiving profession.

Providing professional home care requires a special kind of talent, as well as a unique combination of skills. A caregiving career centers on a passion to serve others—accompanied by patience, empathy and trustworthiness. High-performing caregivers also exhibit dependability, flexibility and enthusiasm. They need exceptional communication skills to build rapport with the people they care for—to break down the loneliness and social isolation so many older people feel and to lend a sympathetic ear to the unique challenges that older people face. In fact, the OECD points out that psychological support that is achieved through conversations is one of the top roles that a caregiver plays.³²

In far too many countries, however, the caregivers we need *most* are the ones we tend to value *least*. A profession that deserves society's respect and appreciation is often overlooked and devalued.



When researchers in the United States asked caregivers what drew them to the profession, more than 88% cited their desire to serve people.³³

This is more than an injustice to the millions of dedicated home care workers across the globe—it is also a major barrier to building the professional, skilled caregiving workforce the world desperately needs to support its rapidly aging societies.

Hidden in Plain Sight

Bioethicist Nancy Berlinger has referred to home care workers as “an overlooked population...in plain sight.”³⁴ This perceived invisibility was made evident during the COVID-19 pandemic.

Despite serving on the front lines of care for the most vulnerable populations—and being deemed “essential” workers in many countries—home care workers were often marginalized and forgotten.

In a qualitative analysis of home care workers in New York City during the COVID-19 pandemic, workers commented that “we are definitely a forgotten field... You hear people clapping, thanking doctors and nurses,...the hospital cleaning staff....I am not doing this because I want praise; I love what I do. But it would be nice for people to show us gratitude.”³⁵



I know it sounds like a cliché, but you feel that you can really make a difference to people in their daily lives, and that's what makes me happiest. I go home knowing that I have done a worthwhile job. Above all, it's the opportunity to provide comfort and care to people in their greatest hour of need.

Emma, professional caregiver, Ireland



While older people and their families recognize the value professional caregivers provide, caregiving is still too often considered low-status work. A variety of factors contribute to this lack of respect for caregiving, each of which makes it difficult to recruit and retain skilled professionals around the world. It is time for universally accepted ideas about the caregiving workforce to correspond with the shifts in supply and demand—and the increasing need of this work within society. All stakeholders can help remove these obstacles by:



Combatting ageism: Too often older adults are marginalized across society, an ageist attitude that influences the people who care for them. Recent social

media trends—like nicknaming COVID-19 the “Boomer Remover” in reference to the high mortality rates in older people—only serve to legitimize this prejudice.³⁶ According to the World Health Organization (WHO), ageism “can take many forms, including prejudicial attitudes, discriminatory practices, or institutional policies and practices that perpetuate stereotypical beliefs.”³⁷ To address this widespread injustice, WHO has launched a global report and campaign to combat ageism.



Bridging the gender gap: Today’s caregiving workforce is comprised largely of women, which perpetuates an image of low-respect domestic work. In the United

States, women account for 87% of professional home care workers.³⁸ In Argentina, one-third of all employed women—but only 3% of all employed men—are care workers.³⁹ As modernization upends traditional male and female gender roles within households, and as workplaces strive to achieve gender equality, caregiving should be no exception.



Linking wages and value: Wages for home care workers are typically on par with jobs requiring a minimum level of skills and training, similar to retail and food service.

Many factors, including high rates of part-time employment contribute to suboptimal wages across the sector. Median annual earnings in the United States are \$USD 20,200⁴⁰—which is below the United States poverty line for a family of four.⁴¹ In England, 73% of independent sector care workers are paid less than the country’s real living wage.⁴² And in Japan, average caregiver salaries are between \$USD 23,000 and \$USD 35,000.⁴³ Industry standards, training and skills development must and will increase with rising demand for quality care. As a result, so too will the cost of quality home care services, which directly correlates with a higher earning potential of the workforce.



Retaining workers: The aforementioned factors all contribute to high turnover rates for caregivers, reinforcing the field's reputation as undesirable. In Singapore, the average tenure of home care workers with their current employers is just 2.6 years, lower than nursing homes or elder day care.⁴⁴ In the United States, turnover rates run between 40% and 60% for home care workers.⁴⁵ Working environments and benefits, as well as recruitment of the workers best suited to caregiving, will be important considerations for employers as the talent pool grows more competitive with the rising need for home care. Unfortunately, only half of OECD countries have made any efforts to recruit workers to the care field since 2011.⁴⁶



Defining a career path: Skills developed in caregiving can be vital in other healthcare and social work professions and within the broader business community. A clearly defined path for trained caregiving professionals that offers access to greater career opportunities is lacking. Caregiving can be a promising job opportunity for those at the beginning, in the middle, and/or at the end of their careers. Yet, these career paths in the aging field are neither well-defined nor promoted.

Reframing aging as the rule, rather than the exception, does not come easily. Without a societal shift in our perceptions of aging, how can we change perceptions to appreciate the value these essential care workers bring, while also building recognition and respect for caregiving as a profession?

Only by addressing these intersecting challenges can we close the supply-demand gap in caregiving—and, more importantly, build a robust, thriving workforce of professional caregivers.

CHAPTER 3:

What the World Needs Now: A New Engine of Job Creation

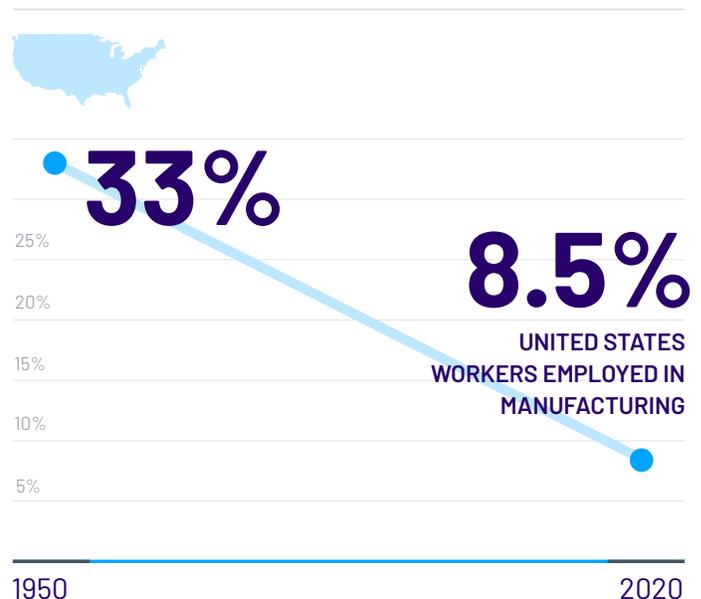
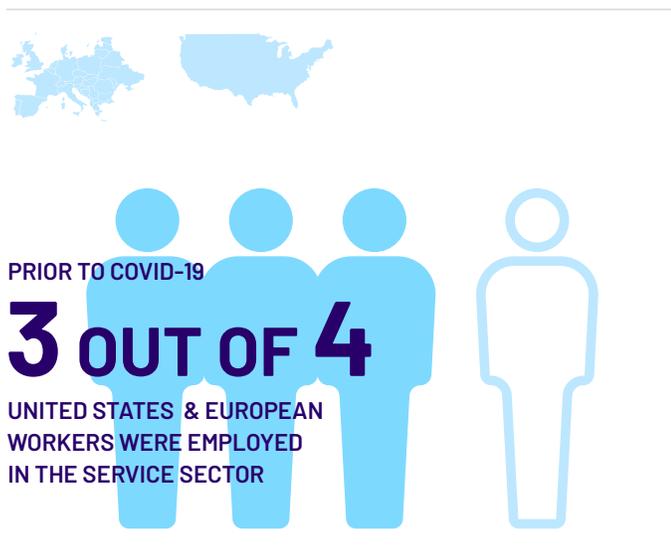
Even before the arrival of COVID-19, the global labor market was in the midst of an intense disruption.

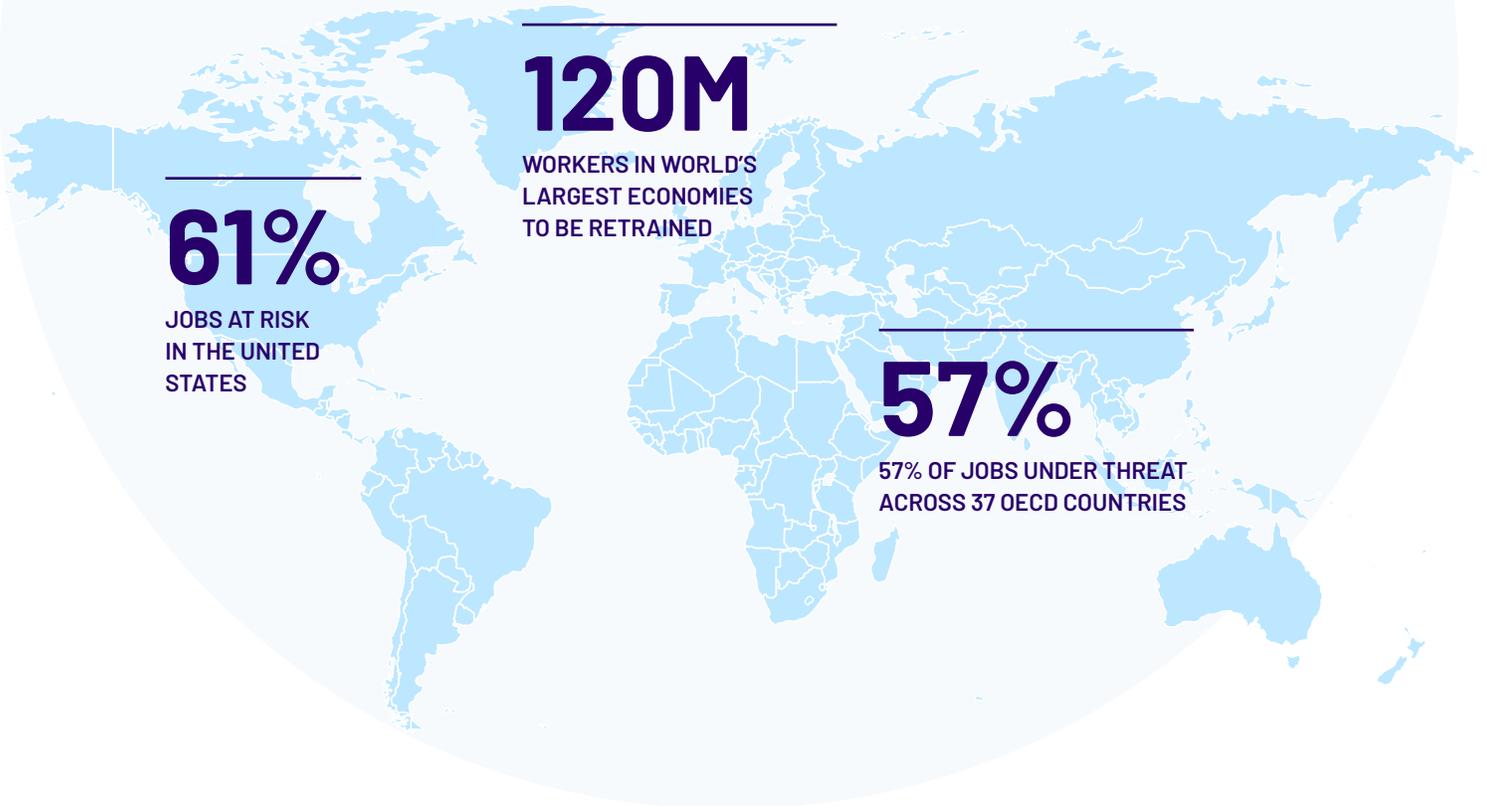
Over the last 50-plus years, both Europe and the United States have seen a massive shift away from manufacturing jobs to service-sector employment. In the EU, manufacturing has fallen from 20% of GDP in 1991 to under 15% as of 2018.⁴⁷ Today manufacturing jobs account for just 8.5% of the workforce in the United States, down from nearly a third in the early 1950s.⁴⁸

As manufacturing jobs dried up, service-sector jobs took their place. Prior to COVID-19's labor market shocks, about three out of four workers in both Europe⁴⁹ and the United States⁵⁰ were employed in the service sector.

COVID-19 only added to the uncertainty. In China, roughly 5 million people lost their jobs due to COVID-19 in January and February of 2020.⁵¹ In March 2020 alone, 701,000 American jobs were lost—the largest monthly decline since the financial crisis in 2009.⁵²

Service sector jobs were particularly hard hit. The pandemic has put more than 120 million jobs at risk in the global travel and tourism industry,⁵³ and retail trade lost 2.1 million jobs.⁵⁴





Interestingly, however, the workforce shifts created new opportunities in the care field. For example, in Sweden, over 1,000 laid-off SAS airline workers were offered the opportunity for fast-track healthcare training as hospital and nursing home assistants.⁵⁵

Many in the program simply wanted to help others in their time of need, demonstrating how the nature of service and purpose are increasingly desired job characteristics.

AI, Automation and Technology Put Jobs at Risk

Beyond the pandemic, many of today's service sector jobs were already at risk from automation, artificial intelligence (AI) and other advances in technology.

According to IBM, these innovations will require retraining 120 million workers in the world's 12 largest economies.⁵⁶ Across the 37 OECD countries, an average of 57% of jobs are under threat.⁵⁷ Researchers have concluded that 25% of United States jobs are at "high-risk" of automation, while another 36% face "medium-risk" of being taken over by technology.⁵⁸

Even before COVID-19, the need for alternative job-creation engines capable of employing millions of people displaced by AI, automation and other technologies was critical. COVID-19 has dramatically accelerated this imperative, as millions of businesses around the world seek contactless solutions that replace people with machines.

Caregiving Is a Job Creation Engine That Can Be Enhanced (but Not Replaced) By Technology

Caring for the world's rapidly aging population is—and will remain—a vibrant growth industry. While technology has made the future of work within all sectors uncertain, there will always be enormous opportunities in caregiving. In fact, caregiving stands at the leading edge of a new wave of employment demand and job creation that can offer rewarding work to individuals displaced by technology, the COVID-19 pandemic and other global shifts.



Clients are scared—and rightfully so. With the pandemic, you're the only person ever seen besides their families. Their age and health conditions make them more vulnerable.

Max, professional caregiver, United States

A Rapidly Growing Industry: The global market for home care is projected to increase from \$USD 304 billion in 2020 to \$USD 516 billion by 2027⁵⁹—a nearly 70% increase.

A Powerful Job Creation Engine: In Brazil, it is predicted that up to 25% of the population needs home care to assist with the activities of daily living.⁶⁰ As of 2018, roughly one-quarter of China's 249 million 60-plus population required care, but there were only an estimated 300,000 certified caregivers to meet that demand.⁶¹ In the United States, personal care aides and home health aides are among the 10 fastest-growing occupations. By 2028, a combined 1.2 million new jobs will be created in these sectors.⁶²

When it comes to caregiving, technology should be embraced—by older people, by their families, by employers of caregivers and by caregivers themselves. However, machines will likely never replace the human touch. Nor will machines replace the intensely human capabilities of compassion, empathy, patience and trustworthiness that define home care workers. Instead, in the future, it will be the human workforce, aided by technology innovations to create efficiencies, that will deliver the best care in the home.



Opportunities for All Ages and Stages

Caregiving offers rewarding opportunities for a broad cross-section of workers—from Millennials (those born between 1980 and 1996) seeking meaning and purpose in their careers, to older adults looking to earn additional income, give back, and stay engaged during retirement. In fact, according to Aegon's 2020 Retirement Readiness Survey, 57% of workers globally expect a phased transition into retirement and envision working in some capacity while in retirement. Fifty-one percent say they want to continue working in retirement in order to keep active physically and mentally.⁶³

A Flexible Encore Career: Many people in their 50s, 60s, 70s and beyond have gained valuable experience caring for children and aging loved ones. Home care provides a rewarding option to employ these vital skills. In addition to bringing practical experience and empathy to the job, these mature workers are able to forge trusted relationships with the individuals, families and loved ones they serve.

Providing Meaning for Millennials: Younger people in search of purpose-driven work are finding that caregiving can offer a satisfying and meaningful career. Research shows that Millennials struggle to find jobs they find meaningful. Nine out of 10 Millennials said it was important for their work to have a positive impact on the world, half would take less money, and two-thirds would work longer hours in order to do more meaningful work.⁶⁴



Millennials don't just see their job as a job; they see it as a representation of their life, and they want that life to have meaning.

How Millennials Want to Work and Live, Gallup, 2016





Millions of people around the world will be looking for new jobs as AI, automation and technology continue displacing humans in more and more sectors. Millions more are looking to leave their current positions in search of work that offers meaning and purpose. Others feel dissatisfied in retirement and want an encore career where they have both flexibility and the chance to make a difference.

For all of these groups and many others, home care—in particular, relationship-based home care—offers opportunities for meaningful work that can not only fulfill the goals of individual workers, but also meet the caregiving needs of the world’s aging population.

The key question: How can we elevate caregiving as a globally admired, valued and respected profession?



Helping Families Make Memories

Kristina

PROFESSIONAL CAREGIVER, CANADA

As a young adult, I worked as a care aide at the local hospital and found it a rewarding experience. After getting married and having children, I spent 12 years as a stay-at-home mom.

During this time, my mother was diagnosed with brain cancer, and I became her primary family caregiver. For five months, I drove to her house every week, returning to my home on the weekends. I was so tired, I couldn't soak up those final moments with my mother because I was so focused on her care. If there was a professional caregiving agency at that time, I would have hired them on the spot.

When my children became more independent, I wanted a job that would allow me to be home for dinner with my family, but also make use of my caregiving skills, and make a difference. Working for a home care agency allowed me to do all of this.

One of my first clients was Beryl, a 96-year-old great-grandmother who needed help a few times a week. I'm still working with her two years later. Just thinking about Beryl makes me smile. We clicked immediately. She was a teacher, so if I use the wrong word, she corrects me. When she's having a super day, I'm literally running to keep up with her.

I put my heart and soul into this job. Clients like Beryl bring so much joy into my life. Given my experience caring for my mother, *I want my clients' families to be able to enjoy time with their loved ones without worrying about caregiving responsibilities. They can focus on listening to stories, having conversations and making memories they will hold close to their hearts for a lifetime.*



From Packages to People

Max

PROFESSIONAL CAREGIVER, USA

After studying music production in college, I had a tough time finding a job in that field. All my previous jobs had been in food service—from fast food to grocery stores to catering—so I wanted to steer clear of that. So, I looked for a job with the highest hourly wage, which turned out to be as a package handler at a large distribution center.

My job paid \$14.86 an hour to unload packages from trucks and transfer them to a maze of conveyor belts running throughout the facility. It was back-breaking work—but what turned me off wasn't working hard; it was the apathy of my fellow workers. Too many people wanted to get away with doing as little as possible. It was not cool to care about doing a good job, and I didn't like that environment.

I lasted four months—and then tried a few gig-economy jobs, but the work was unreliable. Then a friend working in home care suggested I give it a try.

Caregiving was a new experience. I was immediately impressed by the company's professionalism and eagerness to get me working by providing me with the training I needed. Going into my first client's home for the first time was a little nerve-racking.

I didn't know them; they didn't know me. But **the moment I arrived, I realized the importance of my training. I was dealing with a real person with real health conditions, who needed real help. I couldn't let him down.**

That first client was a 92-year-old World War II veteran with advanced dementia who struggled to complete his sentences. But I could see the person inside trying to get out, and I soon learned how to figure out what he was trying to tell me. Every day, I'd make him coffee and food and try to get him to talk a little more—sometimes successfully, sometimes not. We'd talk about his memories of the war and watch old Westerns on TV. One day he put his arm around me and said, "You know, we're really good buddies, aren't we?" That's when I knew I was having an impact.

I've been a caregiver for over a year—and I love my job. At times, it doesn't even feel like I'm working. When you're with someone three or four days a week, you meet their kids and grandkids and get absorbed into their family. I feel truly valued and not like I'm just one of many.

CHAPTER 4:

Building a Professional Caregiving Workforce: A Roadmap

The challenges facing society today are complex, but clear:

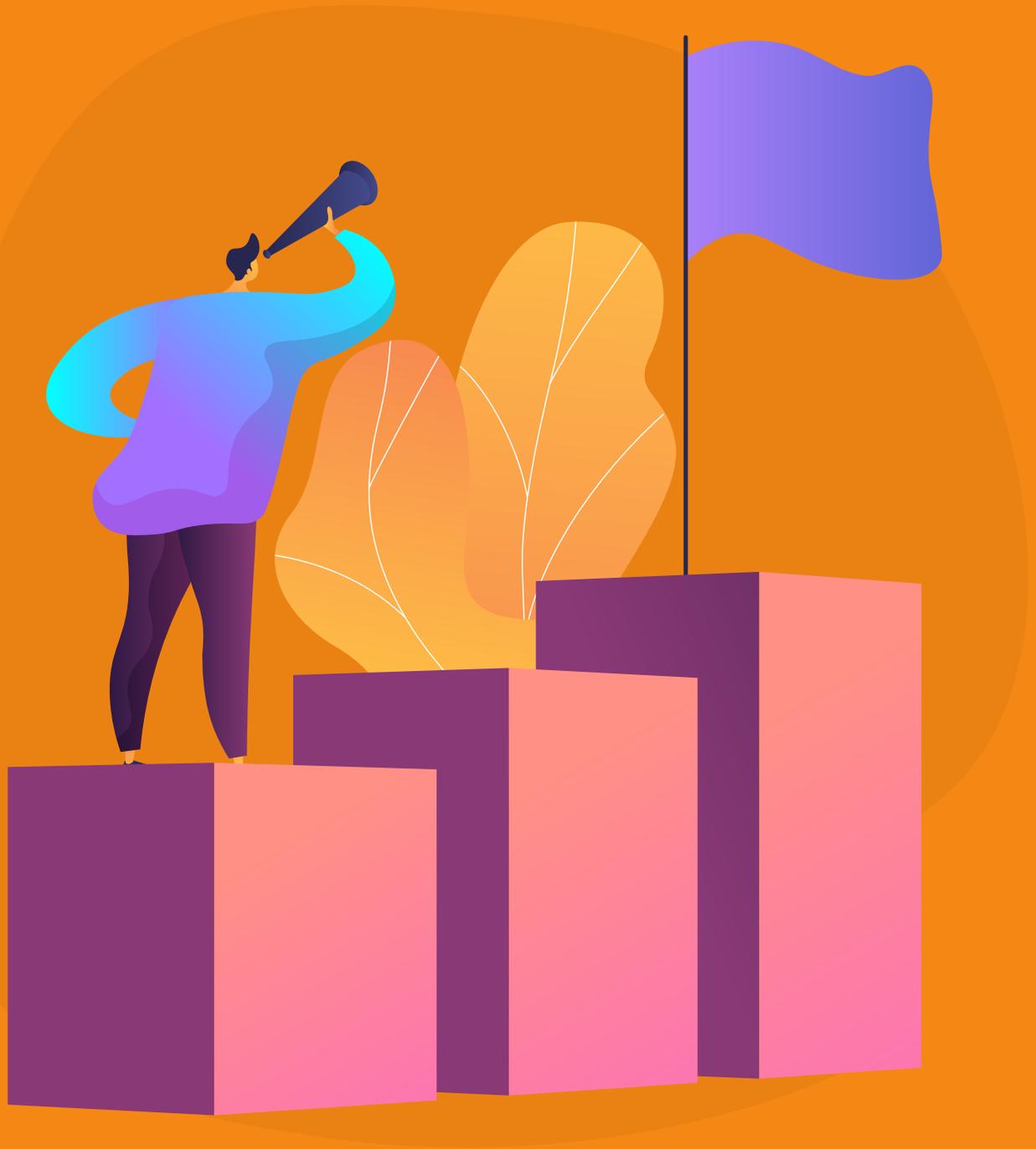
- ! We do not have enough caregivers to provide care for the world's rapidly aging population.
- ! Millions of workers—displaced by technology, downsized by COVID-19, or searching for greater meaning and purpose—deserve well-paying, rewarding jobs with opportunities for advancement.
- ! Technology can enhance caregiving—especially with routine tasks like organizing appointments and medication reminders—but it will never entirely replace human touch and person-centered care.
- ! Professional care companies are already struggling to recruit and retain caregivers.

Innovative solutions are needed to address these challenges. It is tempting to assume that simply raising wages or allowing more migrant workers into a country will solve these problems. But these levers are complicated, and alone they do not constitute long-term, systemic solutions to the challenge of caring for the world's aging population.

Multi-faceted, long-term, scalable solutions are needed. All key stakeholders—public, private, non-profit—must engage in an effort that focuses on building the robust, thriving caregiving workforce of the future. Government

and the healthcare community; insurance companies and labor groups; advocates for older people and individual families—everyone has a critical stake in this outcome and a vital role to play in making it happen.

In that collaborative spirit, the following recommendations are aimed at elevating caregiving as a profession and building a robust workforce that can meet the needs of society, aging individuals and their loved ones.



RECOMMENDATION 1:

Change the Global Perception of the Caregiving Profession so It is Appreciated for Its Value to Society

Shifting society's perceptions of caregiving jobs is a critical first step toward attracting more people. The process starts with campaigns that transform mindsets about caregiving—from a low-skilled job of last resort to a valued, professional career of the future.

What will it take to reposition caregiving? A new public narrative that will change perceptions on a massive scale. Clear messages about the rewards of caregiving—the expertise and specialized training caregivers bring to the role, the exceptional service and value they provide to care recipients, and the professional and ethical standards they uphold in their everyday work.

Governments, non-profits and business leaders all have a stake in ensuring a robust, well-trained, committed pipeline of caregivers to alleviate strains on individuals, families, healthcare systems and economies.

National Campaigns Can Create a Movement and Draw Talent

The nursing and teaching professions have been successfully re-framed by thoughtful campaigns that changed public perceptions. There is no reason why a similar broad-scale effort cannot achieve the same for

caregiving. Unfortunately, over the last 10 years, only half of OECD countries have implemented policies or programs to attract workers to the care field.⁶⁵

In May 2020, the United Kingdom Department of Health and Social Care (DHSC) launched a national recruitment drive. The “Care for others. Make a difference” campaign celebrates the extraordinary work of caregivers and aims to inspire people with the right values and attributes to consider a paid career in elder care. Ads ran across traditional and social media, linking to a website, www.everydayisdifferent.com, where people can read career stories, learn about different caregiving roles, download resources and search for jobs. To help connect qualified people with caregiving jobs, DHSC has partnered with five national job boards that offer support in filling vacancies.⁶⁶

National campaigns involving other professions—in healthcare and other sectors—have also proven successful in elevating respect for these careers and attracting new recruits.

In Germany, government and care industry associations joined forces to launch a campaign to attract nursing trainees. Launched in January 2020, the “Make a Career as a Human” campaign is led by the Federal Ministry for Family, Seniors, Women and Youth. It grew out of the Nursing Training Offensive Plan, which called for increasing nursing apprentices by at least 10%. The plan and campaign are supported by other federal ministries, local governments and many associations in the health-care sector.⁶⁷



We breathe easier knowing our grandmother's care is in the capable hands of a caregiver. I can honestly say my grandmother might not be here today, talking about celebrating her 100th birthday in less than two years, without this support.

Family caregiver, Canada

In the United States, the American Physical Therapy Association has a campaign under the umbrella of “Choose PT.” First launched in 2016 to educate the public on physical therapy as an effective non-opioid and non-drug option for treating chronic pain, the campaign serves as a powerful tool for raising awareness of the benefits of physical therapy and the role of physical therapists as “movement experts.”⁶⁸

Enlist Public Advocates and Create Recognition Opportunities

Associating a well-known public figure with an issue or cause has proven effective at driving interest and raising awareness. By recruiting celebrities or other public figures whose loved ones are benefitting, or have benefitted, from home care, for example, could encourage policymakers and the general public to adopt the need for caregiving for older adults as a cause to be addressed. These efforts will also help showcase caregivers as heroes and elevate respect for the profession as a whole.

Creating annual milestones—such as professional awards and high-profile events—can also help elevate caregiving.

Queen Silvia of Sweden has a longstanding commitment to the quality of care for older people, particularly those with dementia. The Queen Silvia Nursing Award is a scholarship granted each year in Her honor, to nurses in Sweden, Finland, Germany, Poland and Lithuania who submit creative ideas for improving care of older adults

and/or people living with dementia. These scholarships give nurses a platform to discuss innovations in care and highlight the value of the profession.

CarersUK hosts an annual Carers Week and Carers Rights Day to raise awareness of caregiving and highlight the challenges carers face. These events not only focus attention on the contributions caregivers make to families and communities across the United Kingdom, they also enlist people who may not think of themselves as having caring responsibilities to identify with the profession and access much-needed support.



BOTTOM LINE

Governments, non-profit umbrella groups and other healthcare stakeholders will need to pool their resources and expertise to create and organize a movement that brings global recognition to the value of the caregiving workforce. A movement needs ambassadors to become the “face” of the cause. As part of any campaign, well-known and respected celebrities stepping out as ambassadors and sharing their personal stories will help shine a light on the value of caregiving.

RECOMMENDATION 2:

Bolster Training and Education Standards to Ensure Consistent Quality and Accountability

In the early days of nursing, anyone could claim the label “nurse.” There were no standards for nursing care. Most people relied on family members or friends to provide care or, on occasion, would rely on word of mouth to find others who had built a reputation in the community.

Similarly, today’s prevailing view of home care is likely related to the lack of uniform training and educational standards for professional caregivers.

As a 2017 EU CARE/EIT Health report stated: “Today, the European Union and its Member States do not have a standard definition or measurement of quality care, let alone a monitoring mechanism to ensure care standards are being met, an overall caregiving strategy, or EU-led caregiving education, training or curriculum.”⁶⁹

The story is much the same in the United States. There are currently no federal training standards for personal care aides, i.e., home care workers. And in fact, only five states require more than one week of instruction to take on the job.⁷⁰

Some national authorities and advocacy groups have begun to elevate the interconnected issues of high-quality care, caregiving training requirements, and more structured career pathways in the care field.



One of my clients underwent such a transformation after I started working with him that his friends hardly recognized him. He hadn't been taking care of himself, so that was my first challenge. Once we formed a bond, he allowed me to cut his hair and trim his beard, as well as press a suit for him. Now he sits by the front door every morning to await my arrival.

Sophia, professional caregiver, United Kingdom

For instance, in England, care workers can seek continuing education opportunities, including training and courses that culminate in a care certificate. This is one step toward helping the care workforce map a career path.

The Australian Royal Commission into Aged Care Quality and Safety recently recommended defining high-quality care as care that “puts older people first. It means a standard of care designed to meet the particular needs and aspirations of the people receiving aged care... delivered with compassion and respect...designed to respond to the person’s expressed personal needs, aspirations, and...preferences.”⁷¹ In Ireland, Home & Community Care Ireland (HCCI), the representative body for private home care providers, is calling for a number of changes, including:⁷²

- Designating “Health Care Assistant” and “Home Help” as protected titles to ensure the development of these roles as key health occupations;
- Developing care worker grades and career progression paths that reflect skills and experience;
- Encouraging new graduates to enter home care;
- Promoting ongoing professional development and life-long learning among care professionals and making this a requirement of any future registration process for careers; and
- Creating a broad range of training and skills development programs to build capacity.

The Irish government's Health Services Executive (HSE) is the main employer of caregivers, with HCCI member companies employing the second largest group of caregivers. To effectively ensure quality home care, any efforts to professionalize the industry in Ireland and change perceptions must be a joint public/private effort.

Basic training on conditions that increase in prevalence with age—such as dementia, heart failure, osteoporosis, fragility fractures and vision loss—will go a long way toward skill development in many elder care situations and standardization across the profession. It is imperative that home care agencies and government agencies work together to provide professional caregivers the hands-on learning experiences—including the use of technology, mentorship and career support—that carers need to advance in the field.



BOTTOM LINE

Governments must acknowledge the value of the caregiving workforce to public and private healthcare systems in order to meet the needs of their growing aging populations. Legitimizing the value of this workforce will require care providers and governments alike to work to establish quality standards.



THE EVOLUTION OF NURSING:^{73,74,75} POTENTIAL LESSONS FOR CAREGIVING

LESSON 1

Formal training shapes how caregivers are perceived. Prior to the late 1800s, nursing was not a well-respected profession and the quality of care in hospitals varied greatly. Then, in 1859, Florence Nightingale published “Notes on Nursing”—the first instruction manual of any kind for nurses. The Nightingale Training School for nurses at St. Thomas’s Hospital in England opened the following year. The next two decades saw the opening of the first nursing schools in the United States. Professionalized training according to accepted best practices started the process of transforming nursing into the respected position it holds today.

LESSON 2

Shifting from on-the-job training to more formal education takes decades. By 1900, the United States had over 400 hospital-based nursing schools. However, there was little or no standardization of training as each hospital determined its own requirements. Hospital-based diploma programs remained the norm until the latter half of the 20th century. In 1952, Columbia University introduced the concept of a two-year associate nursing degree, with a curriculum combining half nursing classes and half general education classes, plus clinical experience gained in the community. These associate degree programs took off in the 1960s and beyond, largely replacing hospital-based diplomas.

China’s early development of modern nursing education was influenced by western policy reforms. The first college-level nursing program was established in 1920 at the Peking Union Medical College

with funding from the Rockefeller Foundation. Ten years later, China’s nationalist government funded its first secondary-level nursing school.⁷⁶ There were 216 secondary nursing programs established in China by 1949, when the communist government came into power. During the national educational reforms initiated by the new government, nursing education beyond the secondary level was abolished, and nursing education only regained its academic context in the 1980s.⁷⁷ In an effort to build not only a larger but more competent and qualified workforce, China has joined the international movement to implement a national licensure examination for nurses. In 1995, China established the National Nursing Licensure Examination (NNLE). Prior to the establishment of the licensure examination for nurses, nurse registration and management in China had been unregulated, lacking any national standards.⁷⁸

LESSON 3

Governments need to play a role in setting standards. In Japan, modernized nursing professional qualifications were established by Midwives Rules of 1899, Nurses Rules of 1915, and Public Health Nurses Rules of 1941, respectively. Then, in 1942, it was the National Healthcare Act that bolstered public health nurses, midwives and nurses to the level of health-care professionals including medical doctors and dentists.⁷⁹ The first United States nurse registration law, written to protect the title of nurse and improve the practice of nursing, was enacted in 1903, in just one state. It took until 1955 for all states to develop standards of educational training, regulations and laws governing both licensed practical nurses and registered nurses.

RECOMMENDATION 3:

Support and Reward Caregivers Commensurate with the Demands of the Job and the Value They Provide

For all the reasons cited in this report, the need for caregivers will continue to grow—and the workforce of caregivers must grow if we are to care for the world’s aging population, reduce the strain on loved ones and families and lower the financial burden on overstrained public and private healthcare systems.

The field of caregiving cannot achieve sustained growth unless the profession as a whole takes care of its own workers. According to the OECD, the most important policy changes needed are those that focus on improving working conditions and employee training.⁸⁰ Over time, wages will rise with the quality of the caregiving workforce, with training and with growing demand. But employers must pay more attention to the emotional and financial needs of caregivers—especially if they are to attract young, purpose-driven talent.

Building a robust, growing, sustainable workforce of caregiving professionals requires a comprehensive system of support and rewards that are fully aligned with the extraordinary demands of caregiving and the incredible value caregivers provide to care recipients—their clients—and their loved ones. The foundations of this system must include:



Competitive compensation that recognizes the expertise, training and intangible qualities needed to be a caregiving professional.



Comprehensive employee benefits that are a staple of other respected professions and will help attract and retain long-term talent.



Career development in the form of learning experiences that demonstrate to caregivers that they will have opportunities to enhance their skills, advance in their careers and fulfill their passion to serve.



The key to engaging more older adult employees is by helping them focus on their caregiving job, not as a part-time wage filler, but as a second career that they can really develop.

Seiko Adachi, Founder & Executive Head of Social Welfare Corporation, Shinko Fukushikai, Japan⁸¹

A study from Stanford University explains that countries with the highest performing education systems have one very important feature in common: they treat their teachers as professionals. Investing in opportunities for professional training and career development before and on the job, as well as mentorship for ongoing career support, has resulted in high performance of students and education systems overall.⁸² Similar investments should be made in the caregiving workforce, which will continue to grow in demand and in value to society.



BOTTOM LINE

To grow a qualified talent pool, home care agencies, national governments and others that employ caregivers must focus on needs of the incoming workforce and provide workplaces that will attract dependable, flexible and enthusiastic individuals to join the caregiving workforce.

RECOMMENDATION 4:

Fully Integrate the Home Care Workforce Into the 21st-Century Health and Social Care Ecosystem

At a time when the essential need for home care in the health and social care ecosystem is increasing, the professional status of home care workers within these ecosystems has not kept pace. This must change. After all, these are the frontline care professionals who are critical to the delivery of value-based care, play a crucial role across the care spectrum, and provide much-needed assistance to millions of older people worldwide.

While keeping older adults safe at home is a recognized priority for healthy aging, the value of the multitude of benefits it provides is simply not appreciated. Home care plays an important part in early detection and prevention of disease and decline. Home care streamlines transitions from hospital care to skilled nursing or rehabilitation facilities to the home. Home care maximizes choices for older people, allowing them to follow their clear preferences to age in place. Home care reduces hospital readmissions, lowers overall health-care costs and alleviates the burden on family members. But, the status of home care workers remains low.

Some successful examples demonstrate how collaboration between home care providers and other members of the healthcare ecosystem leads to better health outcomes for older adults, thereby demonstrating the value of the home care workforce.



Reducing Hospital Readmissions in

Germany: A pilot program in Naumburg/Saale, Germany showed that collaboration across the full range of professional

care providers, hospitals, rehabilitation facilities and home care workers reduced hospital readmissions for senior patients by more than 30%.⁸³ The program will be expanded to improve upon these results using a new innovative app.



Providing Better Care to Seniors in the UK:

A joint initiative between the Home Instead franchise in Exeter and East Devon and the South West Ambulance Service Trust

trained care teams in using a “traffic light system” for assessing injuries from a fall—a common but dreaded occurrence for older adults. The assessment used red/amber/green indicators to determine whether an ambulance was needed or if it was safe to help the client up from the fall using a Raizer Chair. Since 2017, this innovative initiative has helped lead to a 79% reduction in hospital admission rates from falls and a savings of more than £210,000 for the National Health Service from one location alone.⁸⁴

The potential for improving care and quality of life while reducing costs is enormous. The barrier continues to be antiquated attitudes toward home care from the medical profession and across the healthcare ecosystem, which have permeated across broader society. While these attitudes persist, the essential value of home care within the healthcare ecosystem can neither be recognized nor realized. These attitudes will be hard pressed to change without a robust, engaged and capable caregiving workforce.

In Australia, the care industry has successfully advocated for the creation of a new role: Aged Care Navigator. Currently in the trial phase, Navigators will assist older Australians who need care with learning about available aged care services and how to access them. Navigators will guide care recipients along their lifetime journeys through the aged care system and provide a “go-to” source of knowledge that begins with discussing the care process.⁸⁵

During COVID-19, every state in the United States deemed home care services as *essential*—providing life-saving and life-sustaining support for the physical, mental, emotional and social well-being of older adults. This fact alone demonstrates the critical role home care workers play in the lives of millions of older adults the world over.



BOTTOM LINE

Healthcare systems—whether public or private—must better understand and formally recognize the vital role that home care workers play in the care ecosystem. To grow a qualified, talented workforce—and elevate it in the process—home care agencies, national governments and others that employ caregivers must focus on and truly meet the needs of caregivers.



Providing Care With Love

Jin

PROFESSIONAL CAREGIVER, SHENZHEN, CHINA

One of my first clients, Aunt Xu, suffered from symptoms of Alzheimer's. She was so frightened and felt powerless about stopping the progression of the disease. Her husband didn't know much about it either, and he felt helpless and depressed. This lack of knowledge is not unusual among Chinese families, so education is an important part of our work as caregivers.

To relieve the pressure on their relationship, I started to take daily notes on how Aunt Xu was doing, and what activities she could manage on her own. I kept her husband updated on her progress and also tried to educate him about the disease so he could understand what was causing her symptoms. I encouraged them to spend time exercising together, which I knew would have physical and emotional benefits for both of them.

It's only been a few months since we started working together, but recently I was thrilled to see the couple holding hands. I later learned that it was the first time in many years they had done so. Walking hand in hand—a tiny but difficult step forward and a good reason to celebrate!

Aunt Xu is making progress, slowly but surely. I'm working with her to ensure she maintains the ability to do basic self-care activities, like taking a shower, brushing her teeth, as well as household tasks like folding clothes and preparing meals. We also do creative activities, such as gardening, painting and handicrafts. Each of these small steps goes a long way in helping to enhance her quality of life.



Looking Ahead

As this report demonstrates, the urgent need to build a robust, thriving workforce of professional caregivers is paramount. An aging society demands this solution. Families and loved ones desperately call for help. Older people speak with a clear voice on their preference to age at home. Governments and healthcare systems face unsustainable financial burdens unless new solutions are found.

The caregiving industry, governments, NGOs, patient advocacy organizations, family support groups and other stakeholders must come together to shape the needed solutions for creating the home care workforce our aging world requires. This report's recommendations aim to serve as a catalyst for change to foster collaboration and action.

It is time to build a global workforce of professional caregivers that is highly valued, deeply respected and sustainably growing—a workforce capable of satisfying the demands of older people to age at home; providing peace of mind to family members and loved ones who want the best care for their loved ones; and strongly integrated into the overall healthcare ecosystem in ways that lower costs and create a dynamic continuum of care across the entire aging journey for people everywhere.

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About the Global Coalition on Aging

The Global Coalition on Aging aims to reshape how global leaders approach and prepare for the 21st century's profound shift in population aging. GCOA uniquely brings together global corporations across industry sectors with common strategic interests in aging populations, a comprehensive and systemic understanding of aging and an optimistic view of its impact. Through research, public policy analysis, advocacy and strategic communications, GCOA is advancing innovative solutions and working to ensure global aging is a path to health, productivity and economic growth.

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The Home Instead® franchise network provides personalized care, support and education to enhance the lives of aging adults and their loved ones. Today, the Home Instead network is the world's leading provider of in-home care services for older adults, with more than 1,200 independently owned and operated franchises that provide more than 90 million hours of care annually across 14 countries.

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