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HOME CARE
PROVIDER
OUTLOOK
REPORT 2025

Key Priorities for Home Care Providers

We'd like to sincerely thank the 290+ in-home aged care leaders who generously shared their time and perspectives in our 2025 Home Care Provider Outlook Survey. Your insights have deepened our understanding of the sector's evolving challenges and opportunities in this critical reform period.

We hope this report reflects your voices and informs the decisions of policymakers and stakeholders working to build a stronger, more sustainable aged care system. Your ongoing leadership and commitment to shaping the future of home care are commendable; they are essential. We are grateful for your continued partnership in driving meaningful change and progress across the sector.

Enkindle Consulting acknowledges the Aboriginal and Torres Strait Islander peoples as the First Nations of Australia and the Traditional Custodians of the lands we live and work in. We honour their enduring connection to land, sea, country, kin, and community, and we pay our deepest respects to Elders past, present and emerging as the custodians of knowledge and lore.

INTRODUCING THE HOME CARE PROVIDER OUTLOOK REPORT FOR 2025

With the Royal Commission into Aged Care Quality and Safety's final report now four years behind us, the focus on aged care reform remains centred on transforming government-funded in-home services.

As the sector prepares for the new Aged Care Act and the phased rollout of the Support at Home program, providers continue to face uncertainty around funding, pricing, compliance, workforce, and digital infrastructure.

In early 2025, Enkindle conducted our annual national survey of home care leaders to understand their priorities, concerns, and preparedness on industry priorities, future opportunities and innovation in technology.

This report amplifies the voices of home care providers, particularly those in the Commonwealth Home Support Program (CHSP), Home Care Package (HCP), Short Term Restorative Care (STRC), and National Aboriginal and Torres Strait Islander Flexible Aged Care Program (NATSIFACP) on the path to a more sustainable, client-centred future. We hope it will articulate the important matters for home care providers this coming year.

Jennene Buckley
Enkindle Consulting Director

Tash Edwards
Enkindle Consulting Director

A SNAPSHOT OF OUR RESPONDENTS

290+

We received over 290 responses from home care leaders across Australia.

3,430 +

Leaders who shared over 3,430 + written comments and responses in relation to their view of home care in 2025.

WHAT WE ASKED HOME CARE PROVIDERS IN 2025

- **Greatest challenges facing the home care industry in 2025**

- **Top strategic priorities and focus areas for their organisations**

- **Strategic growth opportunities and future income sources**

- **Preparation for the new Aged Care Act, Regulation Models and Support at Home (SaH) program**

- **Current investment in home care technology**

KEY MESSAGES

FINANCIAL VIABILITY IS NOW THE SECTOR'S BIGGEST CHALLENGE

1

Financial viability was reported as the most pressing concern for home care providers in 2025, surpassing workforce shortages for the first time. Across survey responses, providers consistently highlighted the uncertainty surrounding future pricing models, reduced funding, and escalating costs as significant risks to sustainability. Many stressed that **without clear financial guidance and support from the government, it would be impossible to deliver on the reform agenda.**

Comments also pointed to interlinked challenges, tight timeframes, unclear rules, and increasing compliance expectations, all amplifying financial strain. Providers fear the sector may collapse without urgent detail and funding to enable effective implementation of SaH and the new regulatory model. For many, financial viability is not just a concern; it's the foundation determining whether reform is possible.

PREPARING FOR THE NEW AGED CARE ACT IS THE TOP PRIORITY FOR 2025

2

In 2025, providers overwhelmingly identified implementation of the new Aged Care Act and regulatory model as their highest priority.

Many acknowledged that while these changes are mandatory, they require significant investment in resources, planning, workforce capability, systems alignment, and clinical oversight.

Providers strongly desired to meet these obligations but **called for greater transparency, practical tools, and sustained funding to support delivery on the ground.** Increased complexity of client needs and ongoing workforce shortages compound pressures on already stretched teams. There was a unified call to recognise the operational reality and timely, detailed guidance to enable safe, sustainable, and compliant care.

KEY MESSAGES

PROVIDERS ARE ACTIVELY PLANNING REFORM IMPLEMENTATION THROUGH PROJECT LEADERSHIP

3

Home care providers are taking proactive steps to prepare for the incoming legislative changes, with many nominating a project lead to drive reform readiness. This marks a clear shift from last year's outlook survey, where a lack of information left many in a holding pattern. Providers actively engage with sector workshops, attend webinars, and update reform action plans to steer organisational readiness.

Despite this momentum, commentary revealed that **gaps in funding, resourcing, and information remain significant barriers to progress.** Many providers, particularly smaller organisations, work with limited capacity, relying on already stretched teams to lead reform planning. While the intent is strong, successful implementation will depend on whether providers are adequately supported to operationalise reform within the specified timeframes.

SUPPORT AT HOME PLANNING IS UNDERWAY ACROSS THE SECTOR

4

With the November 2025 start date approaching, home care providers have shifted focus toward practical preparation for the SaH program. **A third of HCP and STRC providers reported that their project teams are now in place and actively mobilising implementation plans.** For many, this includes workforce development, IT system upgrades, unit pricing and scenario planning.

However, significant portions of the sector still feel underprepared, primarily due to a lack of pricing clarity, resource constraints, and a lack of clear guidance from the government. Small providers expressed concern about the viability of continuing under SaH, with some modelling significant deficits. Providers are calling for urgent guidance and transitional support to ensure continuity and quality of care during this significant shift.

KEY MESSAGES

OPERATIONAL EFFICIENCY IS A MAJOR FOCUS FOR 2025

5

As reform accelerates, providers are turning inward to strengthen internal systems and processes. **Business process review, removal of paperwork, performance monitoring, and streamlined rostering have emerged as the top operational priorities for 2025**.

For many providers, the focus is on planning, selecting, implementing and/ or upgrading the current home care platform to ensure it is reform-ready and fit for purpose. At this point, the use of Artificial Intelligence (AI) is acknowledged but not prioritised by most home care providers.

RESTORATIVE AND REABLEMENT SERVICES LEAD FUTURE GROWTH STRATEGIES

6

Restorative and reablement services were identified as the top strategic growth opportunity for 2025, reflecting a clear policy shift and provider alignment toward clinically focused care.

Many noted that SaH appears designed to steer the sector in this direction, with added emphasis on short-term pathways and upfront investment in Assistive Technology and Home Modifications. For providers already delivering high-quality clinical services, the new model offers the potential to expand and refine care offerings.

AGED CARE FUNDING IS SEEN AS THE HIGHEST REVENUE DRIVER FOR 2025

7

Government-funded aged care will remain the dominant source of income for most providers in 2025, with many looking to grow their market share under the new model. **Aged care funding was rated the highest expected revenue driver, significantly ahead of private pay services, brokerage, health or disability-based income streams.**

Despite concerns about pricing adequacy, government funding is still viewed as the most stable and scalable source of growth. There is growing concern that future growth will be constrained without alignment between policy, pricing, and demand, regardless of provider readiness or capability.

KEY MESSAGES

REFORM-RELATED PRESSURE IS NOW THE MOST SIGNIFICANT BARRIER TO GROWTH

8

The **reform agenda itself has become the single most significant barrier to growth in home care**. Providers described aged care reform as "consuming all time and resources," leaving little room for innovation or expansion.

This pressure is further compounded by ongoing uncertainty, particularly around timelines, provider registration, and reporting requirements. Future price caps, increasing regulatory compliance, and intensifying competition were also cited as major barriers to growth.

HEAVY RELIANCE ON ONLINE & SOCIAL MEDIA FOR WORKFORCE RECRUITMENT

9

Workforce recruitment remains a core challenge, with 2025 survey results showing **continued reliance on mainstream platforms like SEEK and Facebook**. These digital channels dominate recruitment efforts in a tight labour market with low unemployment and increasing demand for care workers.

While partnerships with Registered Training Organisations (RTOs) and employment services still play a role, providers are not prioritising international workforce pathways, with home care appearing slower than residential aged care to explore overseas recruitment options. Additionally, providers are not yet tapping into the growing on-demand workforce available through platform providers like Mable and Mobility.

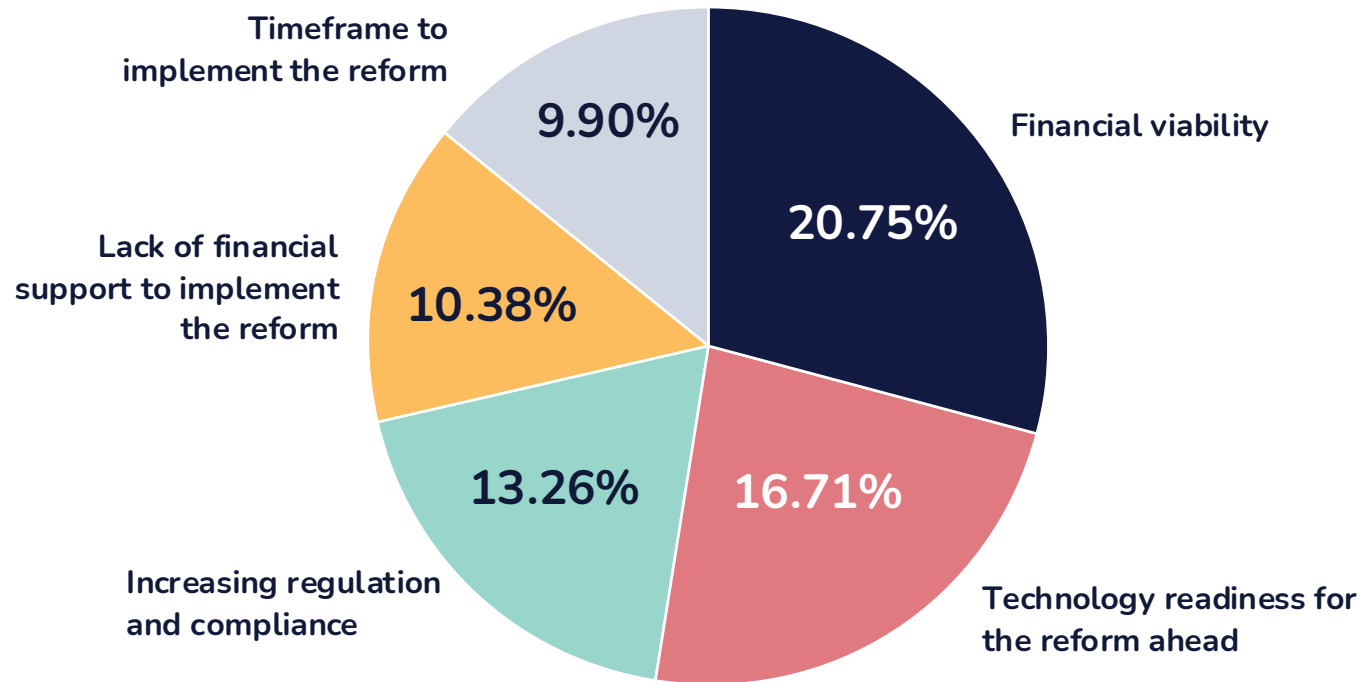## TECHNOLOGY INNOVATION IS OUTPACING IMPLEMENTATION

10

Telehealth, Smart Home Technology, AI in business processes, and Predictive Analytics were rated as the most impactful technology trends for 2025. These innovations promise to transform home care by improving access, enhancing efficiency, and enabling high-quality care. However, many providers reported that embracing technology for transformation feels out of reach.

Key barriers include limited digital infrastructure, a shortage of skilled personnel, and the significant investment required to implement and maintain new technologies and systems. Targeted policy support is essential to close the gap between potential and practice. Financial grants, subsidies, tax incentives, and investment in workforce training are needed to support adoption, particularly in rural and under-resourced areas.

Section 1: OUTLOOK FOR 2025

2025 will be a landmark year for change in home care. Here's how home care providers are preparing for what's ahead.

TOP CHALLENGES FOR HOME CARE INDUSTRY IN 2025

Timeframe to implement the reform — 9.90%

Financial viability — 20.75%

Lack of financial support to implement the reform — 10.38%

Increasing regulation and compliance — 13.26%

Technology readiness for the reform ahead — 16.71%

1

FINANCIAL VIABILITY WAS THE GREATEST CHALLENGE FOR HOME CARE PROVIDERS IN 2025

"Financial viability, lack of financial support to implement reforms, and timelines are all number one, without one, you cannot really achieve the other."

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PROVIDER COMMENTS ON THE GREATEST CHALLENGE FOR THE HOME CARE INDUSTRY IN 2025

Financial viability

- Financial viability, lack of financial support to implement reforms, and timelines are all number one, without one, you cannot really achieve the other.
- There is only daylight between this and the second greatest challenge - Technology readiness for the reform ahead.
- Increasing regulation and compliance, as well as technology readiness, are all top challenges, but the bottom line is financial viability.
- Until the government provides details about future set pricing, it is very difficult to determine financial viability.

Increasing regulation and compliance

- Regulation and compliance pressures, combined with workforce shortages, are making implementation of reform extremely difficult.
- Workforce shortages, driven in part by increased administrative and compliance burdens, remain the most pressing issue.
- Without sufficient staff, we simply won't be able to meet new compliance demands or deliver the care required under the reforms.
- It's not just one issue, staffing, funding, and rising regulatory expectations are creating a perfect storm.

Technology readiness for the reform ahead

- We need to invest in more online service options for clients.
- There needs to be an improvement to both government and industry systems before we invest in technology to meet the upcoming reform.
- With limited time and guidance, implementing education, support, and IT systems is highly time-consuming. High levels of consumer interaction, often unsupported by the government, are adding to confusion and strain.
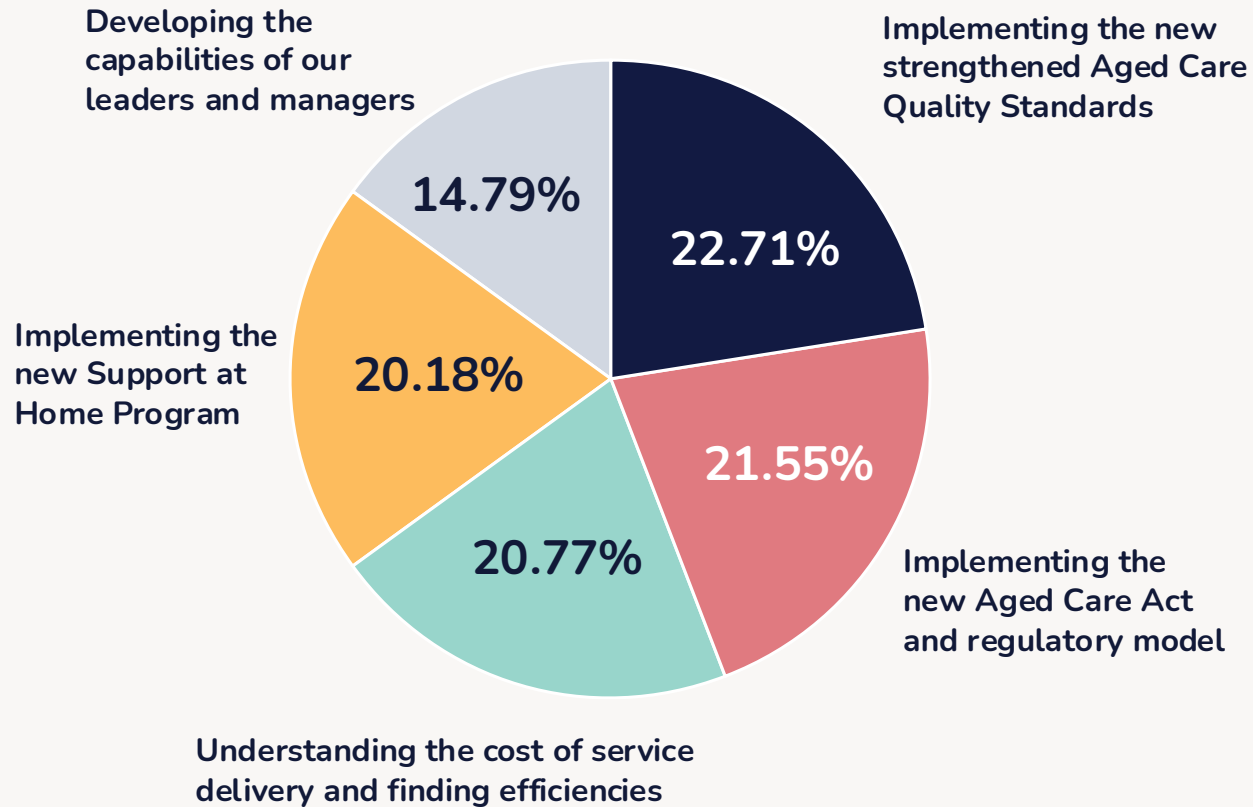
Lack of financial support to implement the reform

- We are concerned that SaH will not be sufficiently funded to operate sustainably.
- 25% of our funding costs have been slashed. We are expected to adhere to the new quality standards, but there's no money to fund the workforce to do this.

Timeframe to implement the reform

- A few months out and we still do not have all the information needed to move forward.
- Uncertainty is creating anxiety.
- There is a need to be provided with all the required information, including guidelines and rules, and a reasonable lead-in time is critical. This would allow us to prepare effectively and provide meaningful feedback to the government about what we can and cannot achieve.
- Short timeframes and a lack of detailed information from the government make it difficult to ensure we are ready to implement the SaH program.

TOP PRIORITIES FOR PROVIDERS IN 2025

Developing the capabilities of our leaders and managers

Implementing the new strengthened Aged Care Quality Standards

14.79%

22.71%

Implementing the new Support at Home Program

20.18%

21.55%

Implementing the new Aged Care Act and regulatory model

20.77%

Understanding the cost of service delivery and finding efficiencies

2

THE TOP PRIORITY FOR 2025 IS IMPLEMENTING THE NEW AGED CARE ACT AND REGULATORY MODEL

"The complexity of client needs and pressure on our workforce makes it clear that implementation of the new Aged Care Act and Regulatory Model won't be possible without real support from the government."

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PROVIDER COMMENTS ON THEIR TOP PRIORITIES FOR 2025

Implementing the new Aged Care Act and regulatory models

- The pressures of delivering care to vulnerable older people, the increasing complexity of client needs, including undiagnosed cognitive issues and rising behavioural challenges. These pressures place significant strain on our staff, who require targeted training and emotional support. We are struggling to maintain workforce morale and retention amidst rising consumer expectations and limited resourcing. There is a strong call for the government to better understand the realities on the ground and provide the necessary support for the effective implementation of the new Aged Care Act and follow the regulatory model.
- Mandatory reforms such as the Aged Care Act, Standards, and SaH program are a given; other priorities focus on the discretionary areas of business improvement.

Implementing the new Support a Program

- While the strengthened Standards and the new Aged Care Act remain priorities, much of the groundwork is complete - the immediate focus is preparing for SaH.
- Leading without adequate government and industry support is risky for us. Clarity, guidance, and the tools required to transition to Support at Home are urgently needed, along with confirmation of funding support.
- As a CHSP provider, we have a longer lead time before implementing SaH, but all our current work is geared toward preparing for the transition.
- Clear guidance on the timing and process for SaH provider registration is urgently needed, providers are currently operating in the dark.

Implementing the new strengthened Aged Care Quality Standards

- Operational priorities such as workforce and costing are deeply connected to the successful implementation of the strengthened Aged Care Quality Standards. Ensuring a strong focus on client experience and clinical care remains central to meeting these new expectations, but there's no money to fund the workforce to do this.

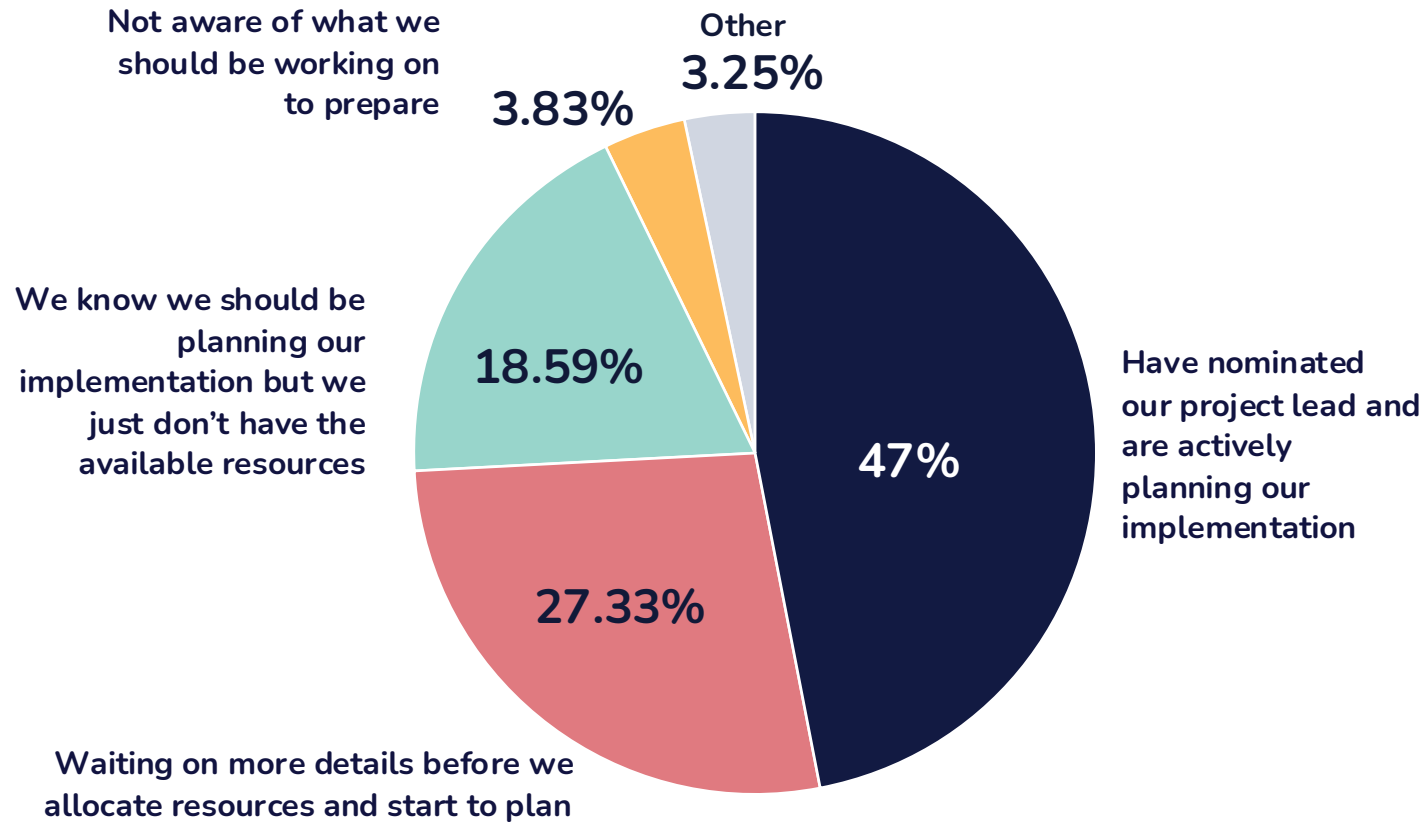## Understanding the costs of service delivery and finding efficiencies

- The first step is determining whether the new model can be delivered within the proposed funding allocations.
- Limited pricing information impacts the ability to effectively plan service delivery and manage client contributions.
- Timely feedback with detailed guidance and funding information would greatly support the ability to move forward.
- There is significant concern that we (small providers) may not remain viable under SaH. Without funding for package management, it will be challenging to sustain quality improvement activities. We are proud of the high-quality, client-centred models they currently deliver, but fear these standards will be difficult to maintain without adequate resources for care planning and individualised support.

Developing the capabilities of leaders and managers

- Leadership capability is a key enabler that strengthens every other element of reform.
- Delivering on multiple reform priorities requires strong leadership. As consumer expectations grow and administrative demands increase, we need capable leaders and managers to navigate change, support their teams, and meet reform requirements, especially amid workforce and funding pressures.

GETTING READY FOR THE NEW AGED CARE ACT AND REGULATORY MODELS

Not aware of what we should be working on to prepare
3.83%

Other
3.25%

We know we should be planning our implementation but we just don't have the available resources
18.59%

Have nominated our project lead and are actively planning our implementation
47%

Waiting on more details before we allocate resources and start to plan
27.33%

3

TO PREPARE FOR THE NEW AGED CARE ACT AND REGULATORY MODELS, PROVIDERS ARE NOMINATING PROJECT LEADS TO ACTIVELY PLAN IMPLEMENTATION

"We're activity planning and have appointed a project lead. We're attending Department of Health and Aged Care webinars and staying as informed as possible to get ready for the new Aged Care Act and regulatory model."

We have nominated a project lead planning implementation

- We are in the process of appointing a project lead and are actively planning - attending webinars and staying engaged to remain as informed as possible.
- We've developed a reform action plan, which is currently being updated and actively progressed by our executive team.
- We've started planning with the information available and Enkindle workshops have helped us get a head start. However, significant unknowns are making it difficult to plan with confidence.

We need more information before allocating resources and starting to plan

- There are still significant grey areas that require clarification before meaningful planning can progress.
- We're still waiting on critical information about government systems and pricing, and there are significant gaps in the details provided so far.
- It's frustrating that vital information is still yet to be released, delaying meaningful progress.
- We're taking a pragmatic approach, implementing what we know while focusing on client experience and workforce retention.
- Understanding the full extent of change and completing a gap analysis remains an ongoing task until the final rules are released.
- It would be valuable for the government to confirm pricing details and outline what will be included in the transitional framework.

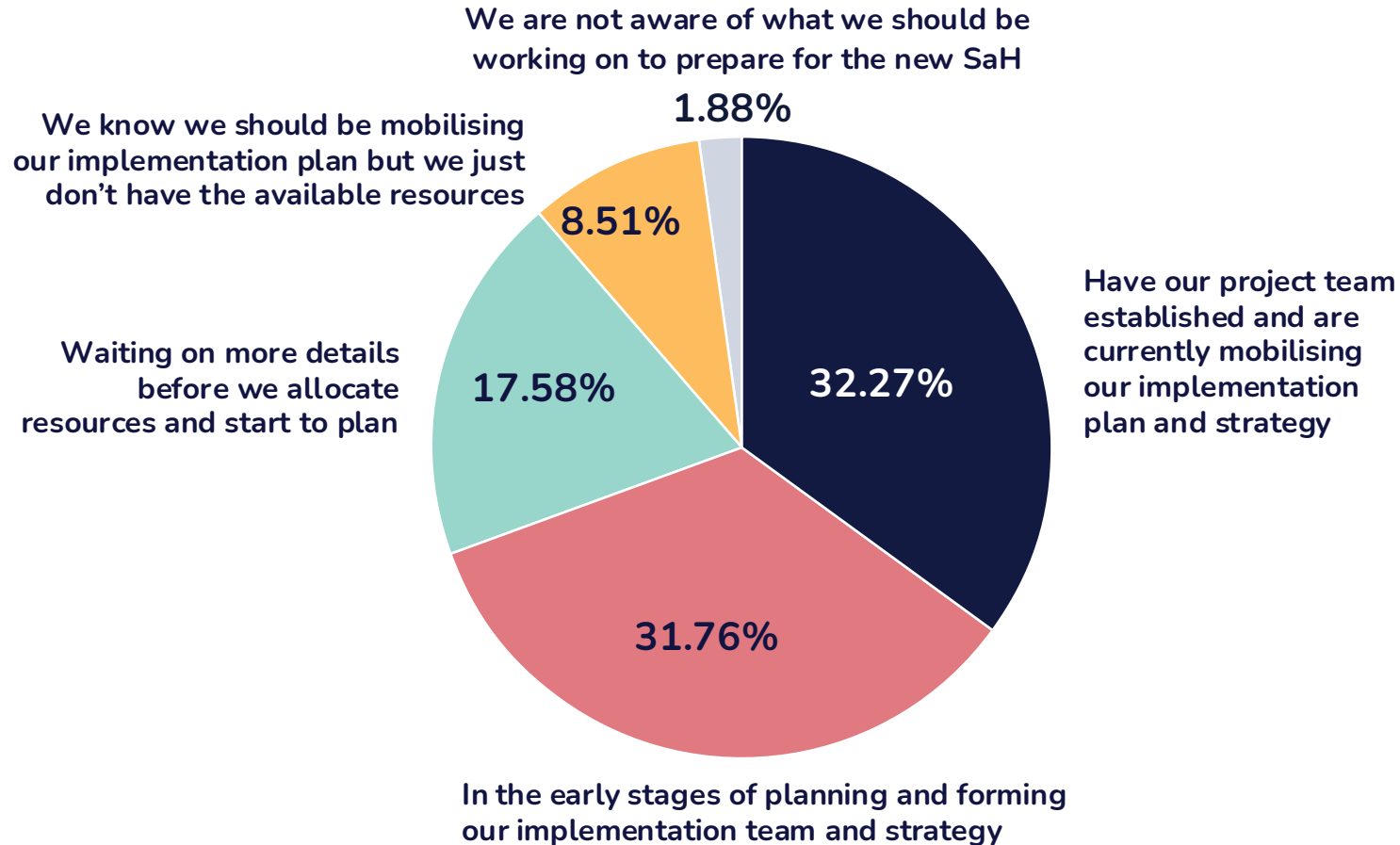**We know we should be planning our implementation, but we don't have available resources**

- Limited time, stretched resources, and a lack of clear guidance are making it difficult to prepare for the changes ahead.
- Current resources are under significant strain, making it challenging to allocate capacity for reform planning.
- With limited resources, we're focused on gathering knowledge - such as attending the Enkindle webinar, before developing a detailed implementation plan.
- We're doing our best with limited capacity, serving just 120 clients means we don't have the resources for a dedicated project lead. At this stage, it's just me, with possible support from our case managers.

We are not aware of what we should be working on to prepare

- With so many unknowns, predicting, planning, or leading effectively is nearly impossible. Even finding information sources is a challenge.

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PREPARING FOR SUPPORT AT HOME PROGRAM

We are not aware of what we should be working on to prepare for the new SaH
1.88%

We know we should be mobilising our implementation plan but we just don't have the available resources
8.51%

Waiting on more details before we allocate resources and start to plan
17.58%

32.27% Have our project team established and are currently mobilising our implementation plan and strategy

31.76% In the early stages of planning and forming our implementation team and strategy

4

TO PREPARE FOR SAH, PROVIDERS HAVE ESTABLISHED PROJECT TEAM AND ARE CURRENTLY MOBILISING IMPLEMENTATION PLAN AND STRATEGY

"We've established our project team and are now mobilising our implementation plan, while continuing to absorb as much information as possible to stay ahead of the changes."

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PROVIDER COMMENTS ON PREPARATIONS FOR SUPPORT AT HOME PROGRAM

We have established a project team and are currently mobilising our implementation plan and strategy

- We are HCP providers and are in the process of strengthening our workforce to meet the upcoming demands. We're also actively responding to consumer questions about the reform and the new Aged Care Act.

We are in the early stages of planning and forming our implementation team and strategy

- We're in the early stages of planning for the flow-on impacts of SaH, while also working to streamline administrative processes across all parties.
- We're gathering as much information as possible to explore our options and inform our planning.
- We're still in the process of registering as an HCP provider and will only have a small number of clients prior to SaH, so our preparations are scaled accordingly.

We are not aware of what we should be working on to prepare for the new SaH

- Key elements like IT systems, funding details, and compliance rules are still unavailable, making it impossible to develop an appropriate plan. It's not even clear how reporting will work.

We are waiting on more details before we allocate resources and start planning

- We're ready to move forward but lack the resources, and we're still waiting on critical information and pricing details to proceed with confidence.
- Some changes align with good governance and business practice, and we're well on the way in those areas. For elements still lacking clarity, we're holding off until there's more certainty, as we don't have the resources for extensive scenario planning.
- The lack of pricing detail makes determining where to begin our planning efforts difficult.
- The philosophy behind the program is strong, and delivering more high-quality services to more consumers is a goal we all share. But if quality is the aim, it must be properly funded.

We know we should be mobilising our implementation plan, but we don't have the available resources

- As a small provider, we don't have the capacity to establish a dedicated project team or access additional support.
- Limited resourcing remains a major constraint, with an overwhelming amount to achieve in a very short timeframe.
- There's so much to do but investing in a system that still feels half-designed without adequate resources or clear pricing details is difficult.
- We've modelled our unit price and may have to consider closure. We're running a $115,000 deficit on case management due to our commitment to low caseloads for quality outcomes. It's unclear whether our current service model can sustain core roles like management, finance, and admin.

BUILDING OPERATIONAL READINESS FOR SUPPORT AT HOME

Highest priority

1. Business process review & automation/efficiency projects
2. Data analytics & performance monitoring
3. Productivity targets/ KPIs for clinical staff and case managers
4. Smart rostering to improve route optimisation
5. Paperless client admission processes to streamline intake

Lowest priority

1. Use of AI in Care & Clinical Management
2. Using Chatbots and AI to reduce call times
3. Outsourcing non-core tasks (IT support, HR, Finance)
4. Use of AI in business process efficiency
5. Contractor Portal to streamline subcontractor processes

5

IMPROVING INTERNAL OPERATIONS IS A PRIORITY FOR PROVIDERS IN 2025

"We're focused on streamlining internal processes in preparation for SaH".

PROVIDER COMMENTS ON PRIORITIES FOR 2025

Highest priority

- We would be better positioned to forecast and deliver clinical services with more detailed price guidance from the Department of Health and Aged Care.
- We're automating some processes, documentation and agreements.
- We're focused on upskilling board members to ensure they understand their obligations under the new model.

Lowest priority

- Unfortunately, many suggested IT improvements are beyond our current scope and capacity.
- Of our 125 clients, only 15% use email and slightly more can operate a smartphone, most would not be able to navigate a client portal.
- Most of our clients struggle to use mobile phones or email. While we have a rostering app in place, only around 10% can use it.
- As a small, centre-based CHSP social support group, many of the listed initiatives are not applicable to our service type.
- We don't yet have a plan in place.
- The cost of implementing these changes is especially high for not-for-profits. In semi-rural areas, third-party engagement is time-consuming and often not viewed as part of the service.
- There's no funding or transitional support. Vendors have drastically increased their prices, and government pricing frameworks in place, it's unaffordable. The lack of coordinated guidance has opened the door to overpriced consultancy services offering repackaged advice

Section 2: THE FUTURE OF HOME CARE

With demand for in-home care projected to double by 2042, and pressure mounting on hospitals and residential care, the future of aged care is shifting firmly towards the home. Here's how home care providers see the future and the opportunities ahead.

WHERE HOME CARE PROVIDERS SEE GROWTH OPPORTUNITIES

Top 5 growth opportunities

1. Restorative & reablement services
2. Dementia care
3. Active ageing and wellbeing services
4. End-of-life / palliative care
5. Social clubs & memberships (online or face-to-face)

Others noted

- New community-based and in-home care models
- Intelligent and technology-enabled care
- Health & clinical services expansion
- Partnerships and service model innovation.

6

RESTORATIVE AND REABLEMENT SERVICES ARE THE TOP STRATEGIC GROWTH OPPORTUNITY FOR 2025

"SaH appears to be steering providers toward clinical services like short-term restorative care and end-of-life support. There's a real opportunity here, but funding must be sustainable."

PROVIDERS' COMMENTS ON STRATEGIC GROWTH OPPORTUNITIES FOR 2025

Restorative & reablement services

- There are significant missed opportunities for home care providers in high-growth areas such as geriatric mental health, rehabilitation and reablement, and chronic disease management.

End of life and palliative care

- The information released about SaH suggests a strong policy focus on clinical service delivery, particularly in areas like short-term restorative care and end-of-life support.

Active ageing and wellbeing services

- Social prescribing is a real opportunity to enhance lifestyle and well-being.
- We're seeing nearly 100 new members join our activity-based services each month. There's strong demand for meaningful engagement and community connection. Affordability remains a concern, so we're exploring ways to embed clinical components into programs to support better outcomes and help reduce client contributions.
- Community-based home care is an emerging service model that combines local resources with in-home support to deliver more comprehensive and personalised care.

Least growth opportunities

Providers see the following as the least growth opportunities for 2025:

- Community chef (in-home specialised/gourmet)
- Pet care services
- Private practice (GP/Nursing/Allied Health).

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GROWTH AREAS FOR THE NEXT 5 YEARS

1. Aged care funding - by growing our market share
2. Private pay services
3. Brokerage service to other providers
4. NDIS & disability Services
5. State health funding
(e.g. Transitional Care, Hospital in The Home)
6. Primary Health Network (e.g. grants and local projects)
7. Veterans services (e.g., assessment, nursing, home care)

7

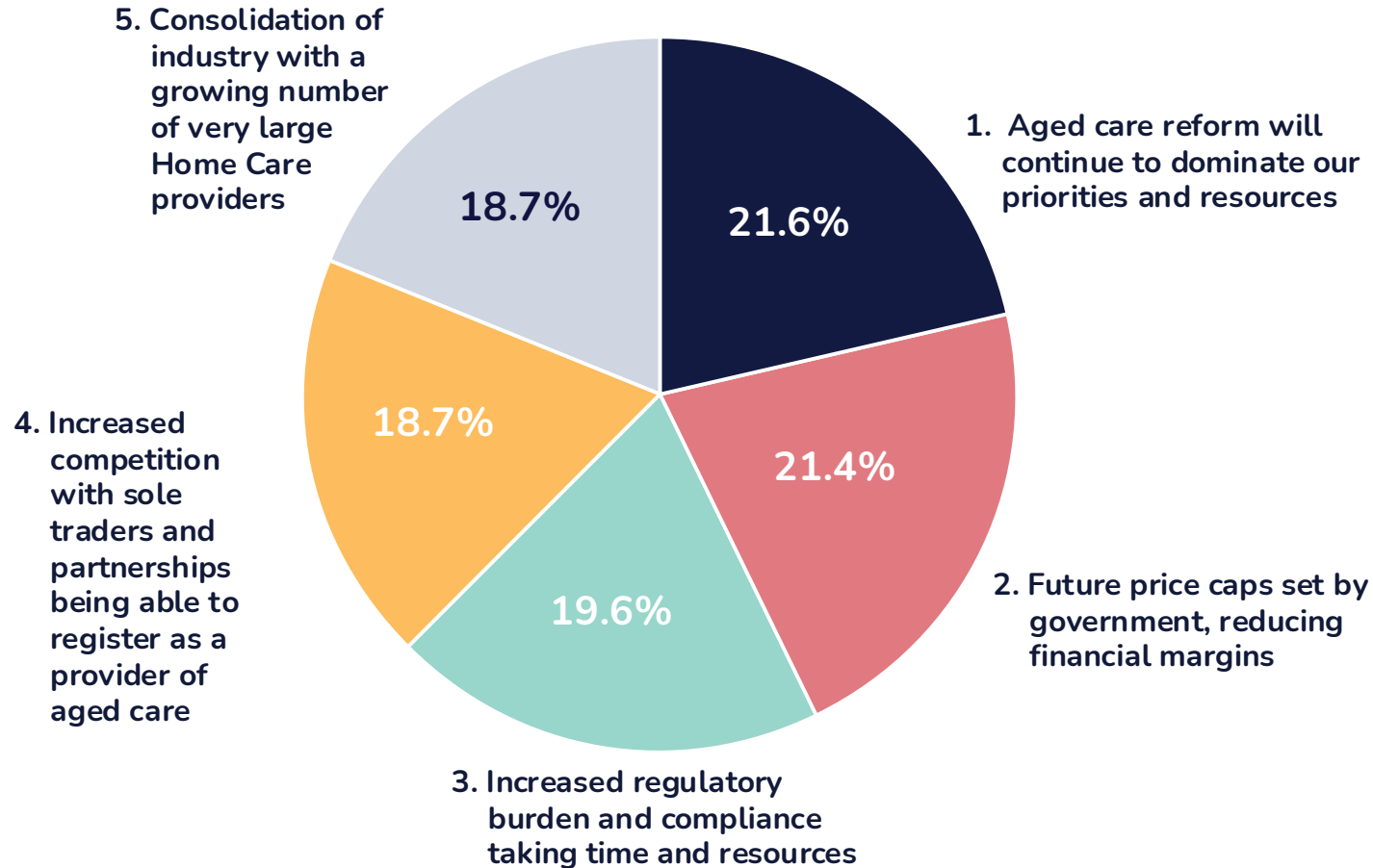### AGED CARE FUNDING IS SEEN AS THE HIGHEST REVENUE DRIVER FOR 2025

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"Our income growth will rely heavily on expanding our share of government-funded aged care. If the funding keeps pace with demand, it's still the most stable and significant revenue stream."

"The demographic demand for growth is clear, but with an underfunded CHSP system and a SaH model that diverges from the Royal Commission's recommendations, we risk creating a fragmented and inadequate system for older Australians."

BARRIERS TO GROWTH IN HOME CARE

5. Consolidation of industry with a growing number of very large Home Care providers

18.7%

4. Increased competition with sole traders and partnerships being able to register as a provider of aged care

18.7%

21.6%

1. Aged care reform will continue to dominate our priorities and resources

21.4%

2. Future price caps set by government, reducing financial margins

19.6%

3. Increased regulatory burden and compliance taking time and resources

8

THE BIGGEST BARRIER TO GROWTH IS THE AGED CARE REFORM

"Aged care reform is consuming all our time and resources; there's little capacity left to focus on growth or innovation."

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PROVIDERS' COMMENTS ON THE BIGGEST BARRIERS FOR GROWTH IN 2025

Aged care reform

- Ongoing governance uncertainty is making it difficult to plan for reform. It's hard to grow when the ground keeps shifting beneath us.

Future price caps set by government

- As a not-for-profit, future price caps will put additional pressure on an already underfunded system. That financial stress ultimately affects our workforce and service capacity.

Increased regulatory burden

- We're an industry at risk; small providers are being pushed out by the growing compliance load. Only the large and well-resourced will survive.

Increase competition

- As a small provider, our opportunities for growth are limited by scale and capacity.

Lowest barriers reported for growth

1. Unable to attract capable senior leaders and managers.
2. No technology roadmap or investment being made to ensure our operations are modern and efficient.
3. No investment being made in marketing or branding strategies.
4. No agreed or clearly articulated growth strategy for our organisation.
5. Unable to attract skilled Board Members for effective governance.

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RECRUITMENT STRATEGIES POWERING GROWTH

Highest priority strategies driving recruitment

1. Social media pages
2. Job boards (e.g. SEEK, Indeed)
3. Registered Training Organisation (RTO) partnerships
4. Employment services partnerships
5. Staff referral incentive program (from current employees)
6. Apprenticeships and Traineeships

Lowest priority strategies

1. Aged Care Industry Labour Agreement (ILA)
2. Palm scheme
3. Visas for skilled workers (i.e. nurses)
4. Partnerships with platform providers
5. Volunteer to employee pathways
6. Scholarships and cadetships

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SOCIAL MEDIA IS THE TOP STRATEGY DRIVING RECRUITMENT STRATEGY IN 2025

"We currently advertise on SEEK and Facebook and recruit from there."

Technology is no longer a nice-to-have, it's essential. Here's how providers rate their current systems and what they see as the next big game changer.

TECH TRENDS SET TO TRANSFORM HOME CARE

Most impactful technology trends

1. Telehealth & virtual visits
2. Smart home technology
3. Wearable devices
4. AI used in business processes
5. Remote health monitoring
6. Predictive Analytics & Big Data

Least impactful technology trends

1. Robotics in the home
2. Avatars and voice AI
3. AI used in Care Management
4. Virtual & Augmented Reality
5. 3D printing of customised assistive devices
6. Drones for medication delivery

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TELEHEALTH & VIRTUAL VISITS SET TO BE THE MOST IMPACTFUL TECH TREND OF 2025

"Telehealth and virtual visits are reshaping how we deliver care, improving access, reducing travel, and helping us reach more clients, especially in remote areas."
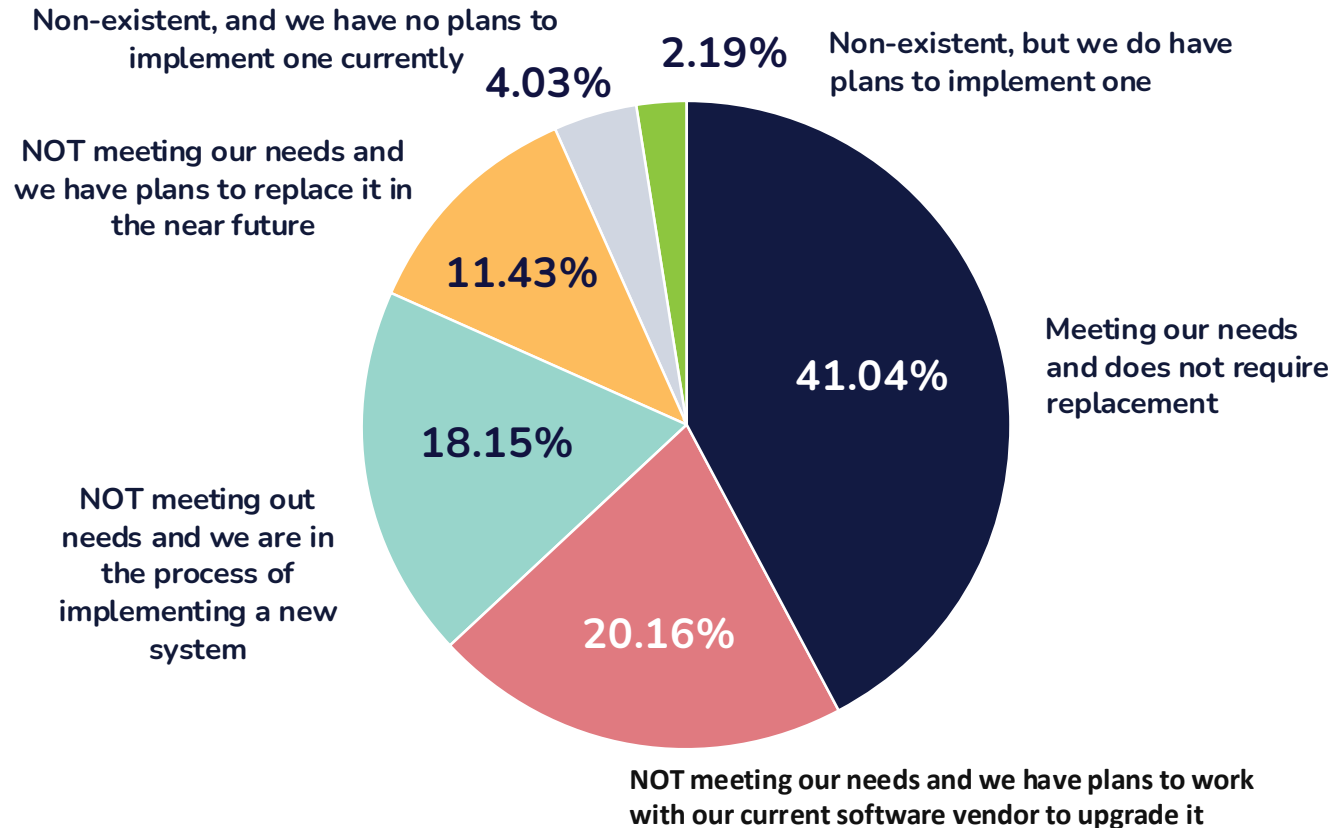
Tech trends

- The impact of a technology depends on the timeframe we're looking at; some trends may take years before they're practical or widespread in home care.
- Many of these innovations feel distant. For some providers, the idea of implementing advanced technologies still seems far off.
- It's important to assess both new technologies' benefits and potential downsides, assuming all tech trends are positive and overlook real risks.
- High setup costs and poor connectivity make rolling out smart technologies in rural areas difficult. Without targeted support, these communities will be left behind.
- For technology to be effective, we need investment in training, infrastructure, and safety. There are concerns about the mental health effects of reduced face-to-face interaction, and risks like falls from smart home devices.
- There's hesitation around becoming too dependent on technology. While innovation can improve efficiency, we can't lose sight of the human element at the heart of aged care.

Other

- Many providers lack the funding, digital infrastructure, or skilled personnel to adopt new technologies, particularly in rural and smaller organisations.
- Policy support, including financial subsidies, tax incentives, and IT workforce development, is essential to enable broader tech adoption.
- Digital communication tools are emerging as critical for engaging and informing clients about services and updates.
- Providers see a need for technology that supports consumer education, onboarding, and awareness of home care options.
- Advanced triage and service-matching systems are being explored to streamline access and personalise care delivery.

THE CURRENT STATE OF HOME CARE TECH

Non-existent, and we have no plans to implement one currently
4.03%

Non-existent, but we do have plans to implement one
2.19%

NOT meeting our needs and we have plans to replace it in the near future
11.43%

Meeting our needs and does not require replacement
41.04%

NOT meeting out needs and we are in the process of implementing a new system
18.15%

20.16%

NOT meeting our needs and we have plans to work with our current software vendor to upgrade it

11

In 2025, 40.94% of providers reported that their home care platform or software is meeting their needs and does not require replacement, while 51.67% stated it is not meeting their needs.

This reflects a slight improvement from 2024, when 74% of providers indicated their home care IT platform either did not meet their needs or was non-existent.

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Home care platform/software meeting our needs

- We're working extremely closely with our vendor to assess whether the software will meet our needs. Integration with modules from other providers is being explored.
- We're at the tail end of a transformational technology rollout, shifting to a connected digital ecosystem across the organisation.
- Our software is currently working on getting ready for SaH changes.

Home care platform/software not meeting our needs

- Limited resources to finance system upgrades to align with SaH is a significant risk.
- We're cautious about investing in technology without clarity on funding, especially if future pricing models are output-only and don't support high capital costs.
- Even getting our IT vendor to engage with us is nearly impossible for a small regional provider.
- We tried working through a vendor alliance to improve our system over a two-year period with little success.
- Much of the higher-end technology remains unaffordable for us as a non-profit provider.
- Software vendors are also struggling due to a lack of clear infrastructure roadmaps and funding.

Most innovative feature of home care platform/software

- Enables remote tracking of vital signs like blood pressure and blood glucose, allowing early intervention and timely care.
- Supports transparency, client engagement, and self-management with access to schedules, documentation, and care updates.
- Streamlines scheduling and engagement of volunteer workforce through a dedicated app.
- Optimises staff allocation while linking directly to payroll and financial systems to ensure efficiency and compliance.
- Full-service capability from dietary planning to delivery logistics within the care platform.
- Uses sensors and alerts to detect anomalies and notify care teams, increasing safety for clients living alone.

CONTACT US

We exist to help create a world-class aged care system through renewals, repositioning, and reinvestment in service models and strategies.

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Strategic Advisory

Strategic Planning & Design

Market Entry & Exit Planning

Operational Review

Stakeholder Engagement

Change Management

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