

SIGNALS

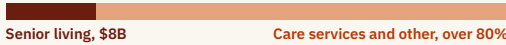
What is changing

What the numbers say

347M **▲ 1 • MORE OLDER INDIANS**
People aged 60+: 149M in 2022, 194M by 2031 and 347M by 2050 [P]. Their share of the population rises from 10.5% to 20.8%.
NITI Aayog (2026), p. 28, citing India Ageing Report 2023

80% **▲ 2 • FAMILIES NEED HELP**
Smaller households and children living in other cities leave gaps in day-to-day support. 80% of providers say families are more willing to use organised care; 62.5% point to greater awareness [S].
PwC–ASLI (Sept 2025), pp. 7, 17, 22

~70% **▲ 3 • NEEDS GO PAST MEDICINE**
of older adults have at least one chronic condition, and about 20% report symptoms of depression or anxiety. Women spend 3.1 times as long as men on unpaid domestic work, which includes caring for elders.
PwC–ASLI, p. 17 • Time Use Survey 2019: 299 vs 97 min a day

\$45–50B **▲ 4 • MOST OF THE VALUE IS IN CARE**
Forecast size of the senior care market in 2030, growing about 20% a year [P]. Senior living accounts for \$8B of this, and fewer than 3% of seniors use it today.

PwC–ASLI, pp. 7, 11–12. Split calculated from these figures.

75% **▼ 5 • DELIVERY IS THE HARD PART [S]**
Share of providers naming each barrier. Capital is one of several.

Workforce		75%
Geographic reach		70%
Funding		64%
Regulation		50%
Digital integration		37.5%
Quality and trust		33.3%

PwC–ASLI, pp. 2, 4, 12, 20–21

SYSTEM ACTIONS [P] for government, providers and funders

01 National care framework and caregiver council

02 Linked primary, hospital, rehab and home care

The aim: longer lives with more independence, connection and dignity.

THE NAVIGATOR MAP

E CHOICES
Where to play
Six calls to make. The dot marks the PwC–ASLI view.

A. Which stage of care will you start with?



Needs change with age. Plan now for how a resident or client moves to the next stage.

B. Buildings or services?



Senior living is about \$8B of a \$45–50B market. The larger opportunity is in care delivered to people wherever they live.

C. Big cities or smaller towns?



Local access matters for seniors outside the metros. Providers rank geographic reach second among their barriers.

D. Build it yourself or partner?



68% of providers make partnerships a priority, ahead of funding (64%) and innovation (60%) [S].

E. Treat the condition or support the person?



Mobility, memory, loneliness and money worries affect outcomes as much as diagnosis. The family caregiver is part of the client.

F. Technology or trained people?



75% of providers are prioritising caregiver training; 37.5% plan telehealth [S]. Remote monitoring works best with a trained person on the ground.

03 Train, certify and register caregivers

04 Published quality standards and outcomes

Edition 01 • ASLI Ageing Fest, Chennai, 28 & 29 Sep 2026

N • E • S • W

S STEPS
What to do next
What to do in the next 90 days

IF YOU ARE EXPLORING

1 **Narrow the entry.** One care stage, one city. Test pricing and staffing there first.

2 **Talk to families.** Find out who decides and who pays: the elder, the adult children, or both.

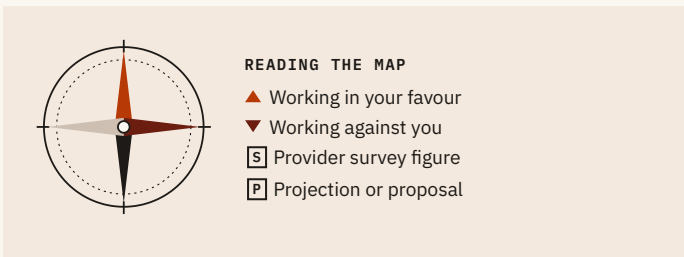
3 **Line up partners.** Clinical, training and technology partners reduce set-up risk.

IF YOU ARE EXPANDING

1 **Add the next stage.** Keep residents and clients as their needs increase.

2 **Secure caregivers.** Train, certify and retain your own pipeline.

3 **Record outcomes.** Set a baseline now so results can be shown to payers and families.



05 Care coverage and household protection

06 Home nursing, day care and respite

[S] provider survey, sample size [to confirm] • [P] projection or proposal



W OUTCOMES
How to judge it
Measure results, not bed counts [P]

PREVENTION **Screening follow-up**

CHRONIC CARE **Avoidable admissions**

INDEPENDENCE **Daily-living ability**

MIND **Wellbeing score**

FAMILY CAREGIVER **Strain score**

END OF LIFE **Comfort, wishes met**

Care domains: NITI Aayog (2026), pp. 54–57, 66–83. Measures proposed.

NOTES What stood out on this map?

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07 Digital records linked to ABDM

08 Public–private partnerships

Sources: NITI Aayog (2026); PwC–ASLI (Sept 2025), pp. 2, 4, 12, 21