



# A Study on the Current Situation of the Community Elderly Care Industry Based on the Diamond Model --Taking Guiyang of Guizhou as an Example

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**Abstract.** As a “sunrise industry”, the community elderly care industry has arisen wide attention from society. Based on Michael Porter Diamond Model, this paper conducts an all-round investigation into the phenomena of the development of the community elderly care industry in Guiyang city from the aspects of production factors, demand factors, related industries, industrial strategies, opportunities, and government policies, which concludes that the community elderly care industry in Guiyang city has obstacles concerning lack of talents, unbalanced development and low motivation of the main body. Based on the welfare pluralism theory, this paper proposes an optimization strategy for the sustainable development of the unity elderly care industry.

**Keywords:** the community elderly care; Michael Porter Diamond Model; elderly care industry; aging problem

## 1 Introduction

In the face of the “silver hair wave” sweeping China with the background of the flourishing advancement of government-led elderly care, every sector of society has begun to attach importance to the construction and improvement of the elderly care industry. In the Implementation Plan for the 14th Five-Year Plan on Active Response to Population Aging and the Construction of Child Care issued by the National Development and Reform Commission and other departments, it is pointed out that social forces are encouraged to participate in the construction and operation of elderly service facilities in the form of public establishment and private operation or public assistance and private construction, and financial institutions are guided to provide financial support to the enterprises and institutions for inclusive elderly care, when banks, insurance, funds and other types of financial institutions join in the cooperation carrying out targeted financial product innovation. [1]

In China, based on Chinese basic conditions and the user experience of foreign countries, the community elderly care industry has gradually shown a trend of transfor-

mation. The reality proves that the current industrial development is caught in a dilemma of misperception of demand and misalignment of supply, and there is a “low-level equilibrium trap” of mismatch between the elderly's ability to pay and the cost of community services, [2] Bringing about the situation that a large number of community elderly care industries are operating in a dismal state instead of the expected “low investment, high return” scenario.

Given this, based on Porter's diamond model together with Maslow's hierarchy of needs theory and welfare economy theory, this paper intends to analyze the current situation of the development of the community elderly care industry in Guiyang City, from six aspects: production factors, demand factors, related and supporting industries, corporate strategies, opportunities, and government actions, to explore the existing dilemmas of the industry, thus proposing corresponding solutions. This study aims to provide insights into the further development of the industry in the region and the whole country.

## 2 Review of the literature

From a supply and demand perspective, the researcher has asserted that elderly people have diverse and differentiated needs and willingness for community-based elderly services, including but not limited to care services, spiritual needs, and social participation [3] while the degree of need is influenced by factors such as traditional culture, income, and physical function [4]. However, the services currently provided by the community-based elderly care industry remain at the level of meeting the basic needs of the elderly in which cleaning and meal assistance are the main services to satisfy the needs of life care while medical and recreational services are equipped with limited supply capacity and poor service quality due to the shortage of medical resources and professional staff [5]. Simultaneously, the quality of community service provision has shortcomings nationally such as uneven and unbalanced [6], mismatched [7], and poor specialization [8].

For these practical factors, academics have gradually shifted their attention to the innovation of the community-based elderly care model. In response to the imbalance and mismatch between supply and demand, some scholars advocate the creation of a “shared” development path for community-based elderly care to reach the stage where the community-based elderly care industry develops collaboratively, precisely, professionally, and orderly on a general level [9]. In this case, to accelerate and realize information sharing, the new mode of “Internet+” has been put on the agenda. Some scholars have suggested that we should speed up the construction of the big data platform covering intelligent health and elderly care services and reintegrating “online + offline” elderly care resources [10], and implement the pilot project of “Internet + elderly care” at the same time [11]. Additionally, promoting the integration of health care and elderly care services and improving the quality of medical assistance services, the medical and nursing care integration model, which includes service assessment, integration of resources, coordination, and innovation, has attracted widespread attention [12].

The existing literature on community-based care has accomplished various significant results, but there is still some room for improvement: firstly, there are relatively few existing specialized studies on the direction of industrialization of community-based elderly care [13], most studies focusing on the general transformation of the elderly care industry [14] or the innovation of the content of community-based elderly care services [15][16]; secondly, most studies remind us of the mere welfare refinement and quality enhancement of community aged care [17][18], lacking the analysis of realistic feasibility and maintainability, especially the supply side; third, there is a lack of detailed studies of relevant cases, mostly large-scale quantitative studies [19] or literature studies [20]; fourth, the researches on the elderly care industry in less developed or remote areas of China are in dearth, taking Guiyang City as an example, only a few scholars having conducted preliminary investigations into the facilities and supply of community-based elderly care services, plus ignoring the generalization of successful community-based elderly care experiences and ideas for practical measures.

### **3 Theoretical foundations**

#### **3.1 Definition of community-based aging**

Among academics, the definition of community aged care is various. Most scholars believe that community aged care is a kind of aged care with family as the core and community as the basis, relying on specialized teams to carry out services [21], so some scholars entitle it as home community aged care as an integral part of community aged care; some scholars hold that the community aged care context is merely limited to within community service institutions, not including the family. The definition of community aging in this paper tends to favor the former, i.e. the introduction of third-party institutions (families, communities, enterprises, etc.). This definition with inclusive characteristics is appropriate to the real situation as based on the role rather than the place of the supply side.

#### **3.2 Maslow's Hierarchy of Needs**

Abraham Harold Maslow (1908-1970) first introduced the Hierarchy of Needs theory in his book *A Theory of Human Motivation*. According to him, human needs can be precisely divided into five hierarchical levels, namely physiological needs, security needs, belonging and love needs, respect needs, and self-actualization needs. Only after the lower levels of needs are met can the higher levels of needs emerge.

In this paper, we mainly analyze the needs of the elderly by corresponding the physiological needs with food and bathing assistance, the safety needs with health care, the belonging and love needs with interpersonal interaction and care-seeking, the respect needs with hospice services and education for the elderly, and the self-fulfillment needs with social development activities. Based on these, the current situation of community-based elderly development in Guiyang will be explored in the end.

### **3.3 Welfare pluralism theory**

In the 1970s, Rose (1986) first proposed the welfare portfolio theory, which asserts that there are three main sources of welfare in society: the family, the market, and the state [22] Abrahamson (1994), Evers (1993) and Johnson (1999) later expanded and refined this theory to form a much more complete theory of welfare pluralism. The theory suggests that the sources of social welfare should be diversified, and should not be completely dependent on the market or the state, as that welfare is a product of society as a whole [23].

The community elderly service industry is compatible with the theory of welfare pluralism, which is manifested in the fact that community elderly service is mainly supported by four parties: the market as the main supply body, the community as the communication bridge, the government as the guiding coordinate, and the family as the sustaining link.

### **3.4 Porter's Diamond Model**

The Michael Porter diamond model is a famous theoretical model by Michael Porter, which is mainly used to analyze the competitiveness of industries. According to Porter, industrial competitiveness is determined by four factors and two variables: factors of production, factors of demand, related and supporting industries, corporate strategy, opportunities, and government. Of these, the four factors interact to form nodes and the two variables exert influence on the overall factors.

The model is capable to analyze the community aged care industry powerfully. In terms of purpose, the aged care industry, as a new industry, needs a sound and mature theoretical system to guide its specific practice while the model was originally constructed to analyze the competitiveness of the industry; in terms of factors, except for the four basic factors, the aged care industry has great development opportunities and advantages with the strong support of the government in recent years; in terms of problem-solving, the model can be helpful to the improvement and resolution of the mismatch and imbalance between supply and demand in the retirement industry, for the supply side of the elderly industry can be attributed to the production factors and related industries, the demand side corresponding to the demand factors in the diamond model.

## **4 Development of Community Aged Care Industry in Guiyang City Based on Diamond Model**

### **4.1 Factors of production**

#### **4.1.1 Primary factors of production.**

Firstly, there is a trend of continuous expansion in the aging population in Guiyang City from the demographic characteristics. Until 2021, there have been 796,225 people aged 60 and above in the total resident population, accounting for 13.30%, of which 566,932 people aged 65 and above accounted for 9.47%. [24] Reversely, compared to the national average, the proportion of Guiyang's elderly population is still small. This

situation exerts two implications: on the one hand, the relatively low pressure of population aging in Guiyang City has reserved sufficient time and space for the construction of infrastructure, improvement of related services, and recruitment of professionals in the community elderly care industry, creating opportunities for all parties to explore the path of industrial innovation in depth; on the other hand, it also means the reduced number of target users, which will objectively restrict the industry with the smaller scale of demand.

#### **4.1.2 Premium production factors.**

As primary factors of production vary greatly from region to region and are less susceptible to human intervention, advanced production factors have a more effective influence on the state of the community aged care industry through their flexibility and variability. These factors contain human resources, capital resources, infrastructure, and the state of research.

In terms of human resources, it is needed to emphasize the training of community elderly care service specialists in regulations. Guiyang focuses on cultivating high-quality community elderly service personnel by requiring community cadres to carry out studies on knowledge related to elderly care and encouraging senior cadres as well as social experts to be responsible for the relevant training. In terms of social forces, making full use of the merits of universities and private think tanks, Guiyang has laid the foundation for the storage of future industry development reserves. Also, the city has developed and implemented a professional qualification system for elderly care to further improve the standardization and advancement of the industry.

In terms of capital resources, the community elderly care industry has shifted from one where the government is the main investor to where multiple entities collaborate and private capital operates. At the beginning of the industry, the process of social capital participation was slow. Not only the number of social capital-operated daycare centers for the elderly was relatively small, but also their business conditions were worrying, most of which operating at a loss or even closing down, so most community elderly care institutions were funded by the government. In Huaxi District, investing 3.3 million yuan, daycare centers for the elderly building occupied a total area of 1670 square meters, with 30 beds planned [25]. With the expansion of the scale of the industry plus the accumulation of practical experience, the province has issued policies to support the governments of districts and counties. Through the PPP model, governments hand the packaged community elderly care services to social capital parties for investment, construction, or operation. This mode enables the achievement of uniform standards and operation of community elderly care service projects in the region. [26]

In terms of infrastructure, the coverage of community elderly care services is expanding and the construction of facilities is steadily advancing. At present, it is clearly stated in the "Special Plan for the Layout of Senior Care Facilities in Guiyang City (2020-2035)" that the plan is to arrange 4 residential areas by the "15-minute living circle residential area - 10-minute living circle residential area - 5-minute living circle residential area". It is scheduled to arrange 41,300 beds and 113.41 hectares of land for elderly facilities. Guiyang's community elderly care industry has potential for development. Guiyang City plans to speed up the construction of the "15-minute elderly care

service circle” in 2022, during which add 22 street elderly service centers and 160 community elderly service stations in all districts and Gui'an New Area [27]. On this basis, the integration of the elderly gymnasiums in the communities, the "Starlight Senior Home", senior citizen university, and other service facilities are on the way to establishing a fully functional home care service center.

## **4.2 Demand factors**

There is still a gap in the degree of development of community care in Guiyang compared to institutional care and other models. From the urban residents' consumption index, the consumption of elderly care services has increased by 6.6% year-on-year from 2016 to 2020. [28] The current size of Guiyang's elderly population is huge, the group of semi-disabled and empty-nest elderly people is in urgent need of social attention, and relying purely on family elderly care is no longer in line with reality. In this case, as a transitional means and a necessary way, community elderly care can create a moderate balance between the needs of the elderly population and available resources. However, for the different types of elderly people, the right remedy should be given taking their needs into account.

### **4.2.1 Elderly People with No Means of Support.**

The Law on the Protection of the Rights and Interests of the Elderly stipulates that if an elderly person is incapable of working, has no means of subsistence, or has no breadwinner or supporter, or if his breadwinner or supporter is genuinely incapable of supporting or supporting him, the local people's governments at all levels shall provide support or assistance by the relevant provisions. This type is called the elderly people with no means of support.

These people are dependent on social support to maintain their daily lives due to their loss of working capacity, lack of stable sources of income, and absence of family support. Therefore, the primary concern of community elderly care services for them is life care, such as food, clothing, housing, and transport. At present, community elderly care services in Guiyang have become more mature, especially in the area of life care, which includes meals, cleaning and shopping assistance, assistance services, daycare, etc.

In terms of safety needs, the majority of the group is disabled and semi-disabled, and most of those who can take care of themselves are suffering from chronic diseases such as diabetes, hypertension, or old age diseases. The construction of basic medical hardware facilities and the investment of professional resources are required to meet such needs. According to a sample survey in 2015, the health condition of the elderly in Guiyang is the best in Guizhou province, with 91.25% of the elderly population being healthy or healthy, only 1.3% being unhealthy and unable to take care of themselves. [29] Benchmarking the level of medical care and the degree of policy inclination in Guiyang, this type of people can enjoy complete medical service assistance, such as regular medical consultations, health guidance, home delivery of medicine, and low cost even free medical care.

In terms of the need for belonging and love, the elderly with no means of support have a lack of emotional sources to different degrees, and simultaneously they suffer from the torpor of missing roles in society and a serious sense of meaninglessness. To surmount this problem, there are two methods. With the help of community workers, the community elderly services in Guiyang provide regular home visits, psychological counseling services, and regular community recreational activities to enrich the spiritual world of the elderly and enhance their sense of identity. In addition, mutual help activities, such as organizing elderly associations, elderly training courses, elderly mutual help groups, and elderly volunteers, are widely carried out to build up the spiritual network within the community elderly group, so that they can generate a sense of belonging to the group.

#### **4.2.2 Empty nesters and substitute elderly people.**

Huang Runlong (2003) held that empty nesters are elderly people who do not have children living together, including those who are childless and live apart from their children. Such elderly people have different levels of need for various elements, depending on their income level, education level, marital status, and children's status.

In terms of marital status, the need for companionship is more pressing for single elderly people compared to those with spouses. According to a sample survey in 2015, the overall proportion of widowed elderly people in Guiyang is low at 23.71%.

Compared to those who have children to support them, empty nesters are in urgent need of social support and care both materially and spiritually. So the main strategy of community elderly care services is to properly respond to their spiritual needs based on ensuring their low-level physiological and security needs. For example, the daycare center for the elderly in Zhongcaosi Street is a pilot project of the "Guiyang Industry and Commerce Health Care", which focuses on the elderly who are empty nesters, live alone, lost, and in special need. This pilot project integrates health management, Chinese medicine, and health care services with day care, cultural entertainment, and public welfare services.[30]

The majority of empty nesters whose children have left home are not trapped in a low level of physical supply. Conversely, most of them desire companionship, respect, and a sense of self-worth. As of November 2021, the total amount of people working outside of poverty in Guiyang reached 16,987,000, which, while promoting employment, has also exacerbated the problem of elderly people left behind in Guiyang's rural areas, there being an influx of young and strong rural labors working in the cities. the Guiyang Municipal Bureau of Civil Affairs has proposed to strengthen rural elderly care with the emphasis on "integrated packaging", providing a comprehensive service platform for rural empty nesters, those living alone and left behind as well to meet their needs for living care, medical care, spiritual comfort, cultural and sports entertainment, and emergency assistance, which may achieve "Integrated resource coordination".[31]

#### **4.2.3 Normal elderly people.**

Apart from the above two categories of elderly groups, most of the elderly in Guiyang are unable to live independently with the company of their children, but with the

deterioration of their physical functions, they still need help from community elderly services. Some of them suffer from chronic diseases such as hypertension and coronary heart disease, and the community needs to be equipped with appropriate routine check-up services to meet their safety needs as far as possible. For the higher level of services such as medical protection, rehabilitation care, and psychological counseling services, further investment and improvement are needed.

At the same time, the normal elderly group has a stronger need for respect and self-fulfillment than the first two groups. Guiyang City has adopted the main strategy of “asking the people what they need, asking the people what they want, and working for the people” and decided to create a “15-minute elderly care service circle”. By consulting extensively with the elderly population, the government enhances their sense of access, responsibility, and belonging based on the renovation of community elderly care facilities.

### **4.3 Related industries**

The community home care industry straddles the secondary and tertiary industries and has a more complex and extensive industrial chain than the purely industrial sector. The aging industry mainly includes the secondary and tertiary industries that produce aging products and provide aging services for the elderly. The primary industry, i.e. the industry that provides basic materials and services such as raw materials and transportation, will be excluded, but to present a more comprehensive picture of the composition of the community aging industry and the process of supply, this paper will classify it as the upstream of the industry chain. Accordingly, the community aged care industry chain can be generally divided into three parts: the main upstream part is the basic industries such as raw materials, transportation, and energy supply, and the midstream part is the producers of major goods such as aged care products, aged care services and real estate, and the downstream part is the direct service providers such as community aged care institutions and service points. This main industrial chain cooperates with medical, financial, and information technology industries to drive related industries and at the same time effectively use external advantages to strengthen its foundation. This paper mainly discusses midstream industry and downstream industry.

#### **4.3.1 Midstream industries.**

In the community elderly care industry chain, the midstream industry plays a huge influence on the quality of services and is the main node of intervention for private capital. The contents of elderly products in Guiyang include medicines and health care products for the elderly, intelligent health monitoring equipment, daily necessities for the elderly, medical equipment and assistive rehabilitation appliances, etc. The products cover a wide range of areas. Community elderly services mainly focus on catering, cleaning, nursing care, leisure, and entertainment, while medical protection and recreation services are not deeply involved, and psychological guidance and hospice care are missing; the elderly real estate industry has bright prospects for development and strong policy support, but is still in its initial stage overall.



#### **4.3.2 Downstream industries.**

The downstream industry consists mainly of individual elderly people and private entities, including various types of social organizations for the elderly and voluntary service teams. Many communities in Guiyang cooperate with care service organizations and elderly products suppliers to provide services to the elderly, sell elderly products, provide guidance on the use of products and guarantee after-sales services, as well as implement a full process responsibility mechanism, and conduct return visits to the elderly to inquire about their service experience and product usage, thus building a relatively complete service system.

### **4.4 Industrial Strategy**

Using the socialist context as a base point for dispersion, the community care industry is still at an early stage of development and does not lend itself to a fully market-regulated approach or business model. This means that a reasonable approach at present is for the government to support the development of the industry and gradually shift the lead to social third-party organizations. At the same time, as the economy develops, there is a misalignment between purely family and institutional care and the current demand for elderly care, and the community-based elderly care industry shows great promise for development.

#### **4.4.1 Responsible subjects.**

The current community elderly care industry in Guiyang is mainly led by the government in resource allocation. The source of government investment is mainly composed of local financial expenditure, income from lottery public welfare funds, and other components. Due to the excessive pressure on local finances, Guizhou Province has carried out the "World Bank and AFCD Joint Financing Support Loan Project for the Development of the Elderly Service Industry in Guizhou" (referred to as the WB project), while Guiyang City, as the capital city of the province, has received 559 million RMB for the construction of the elderly service system. Based on the construction objectives of the project, the loan funds will be invested in different areas and projects, mainly for "initial screening and assessment of the elderly, government purchase of elderly services, quality and efficiency improvement of elderly institutions, construction of elderly personnel, aging-friendly renovation and construction of dispatch and command center" [32].

#### **4.4.2 Service targets.**

Based on 16 street elderly service centers and 83 community elderly service stations already set up in 2021, Guiyang will start the construction of 22 street elderly service centers and 160 community elderly service stations in 2022 and plans to build 22 street elderly service centers and 77 community elderly service stations in 2023. [33] However, there is still a large gap in the progress of building the elderly service system between urban and rural areas in China, and the rural areas have a much larger elderly base group compared to the economically developed cities. Therefore, balancing the

difference between urban and rural community aged care has also become one of the pain points of the current industrial development strategy. The distribution of the community elderly care industry is expanding from urban to rural areas. The government of Guiyang City is focusing on the construction of rural mutual help and happiness homes, with the basic principle of "one home for one village", to meet the basic needs of rural elderly people for mutual help services, with the key targets including rural empty nesters and five-poor households.

#### **4.4.3 Service content.**

The service content of the community elderly care industry in Guiyang covers a wide range of services, which can be divided into categories such as basic care, medical care, entertainment, social interaction, knowledge and mutual assistance, and spiritual comfort. The Huaguoyuan Recreation and Wellness Base in Guiyang City supports the operation of embedded community aged-care institutions and service stations by aged-care institutions on the basis of the aging-appropriate renovation of residential buildings in the communities. "It also supports property companies to provide meals and regular visits to the elderly. [34] Thus, it can be seen that the community is making efforts to improve the quality of elderly care services and build an operating model that meets its own development status.

### **4.5 Opportunities**

In Michael Porter diamond Model, opportunities refer to unexpected events that are not expected by the enterprise, which can promote the accelerated change of the industry, promote the maturity of the industrial model and build new industrial competition. The community elderly care industry has the necessity and feasibility of development in today's context, which is mainly reflected in the three major factors of technological progress, economic development, and ideological liberation.

#### **4.5.1 Scientific and technological progress.**

As a base for the development of big data in the west, the province of Guizhou has made several parallel efforts in the field of scientific and technological innovation and has developed strongly. Through vigorous cultivation of the four elements of key technologies, first products, leading enterprises, and leading talents, Guizhou's regional innovation capacity, and comprehensive science and technology innovation level were tentatively ranked 18th and 25th in China in 2021, up two places compared with the same period; the output value of high-tech industries has reached 553.402 billion yuan, up 16.8% year-on-year. [35]

As the capital of Guizhou, Guiyang's "Big Data+" empowerment strategy has gradually transformed into a booster for the development of various industries. Guiyang is committed to building the first "community Internet + home care service center" system, which organically combines home care and community care with the help of a big data platform, providing basic care services for the elderly such as home cleaning, online meal ordering, medicine delivery, home appliance repair, and personal cleaning and

care. It is also worth mentioning that the Guiyang City Oil Press Community also combines online and offline services, setting up a "Health Life Hall" based on the existing facilities of the Home Community Day Care Centre, providing health monitoring services and health assessment services for the elderly, improving the service content of the Home Community Day Care Centre and strengthening the information platform to support the space.[36] On top of laying the foundation for building an online platform for community aged care, technology as a key factor also indirectly contributes to the counterpoint training of aged care talents and the income growth of the elderly population.

#### **4.5.2 Economic development.**

General socio-economic development is a prerequisite for the promotion of the community-based senior living industry. The "old age before wealth" dilemma of the past is showing changes in the context of socialism entering a new era. According to the Guiyang City Statistical Yearbook 2021, Guiyang accounted for 24.2% of the province's gross domestic product, with a per capita gross domestic product (average for the household population) of RMB 79,626, a growth rate of 6.1%, and an average annual wage of RMB 101,829 for employees in employment, an increase of 9.9% over the same period. The data from the 2015 Guizhou Province 1% Population Sample Survey shows that Guiyang City has the highest proportion of elderly people with a retirement pension in Guiyang Province, at 52.02%, and the least number of elderly people relying on other members of the family to support them, at 11.53%. It is easy to see that Guiyang has a high degree of local urbanization and development, and the main source of livelihood for the elderly is concentrated in retired pensions. [37] The basic pension for urban workers in Guiyang has experienced consecutive years of increases, with the monthly per capita level rising from RMB 647 in 2004 to RMB 2,087 in 2015. It can be expected that on the demand side, the overall consumption level of the new elderly population in the future will also continue to rise in line with the higher production level.

#### **4.5.3 Emancipation of the mind.**

As the overall knowledge level of the Chinese population has improved, on the one hand, the dependence of the elderly on their children has diminished, and the old concept of "raising children for the elderly" has been challenged, with ideologies gradually shifting towards independence; on the other hand, in the past, leaving parents to be cared for by the community or institutions was generally regarded as a form of unfilial. Nowadays, with the high speed of society and changes in productivity and production methods, the practical constraints of family care are being carefully considered.

### **4.6 Government policies**

The government directly influences the competitive advantage of companies and industries through its policies in capital markets, subsidies, production standards, and competition regulations. [38] It is easy to see that in the field of community elderly care

industry, the role played by the government is almost decisive in the interaction of the four factors, and can even be said to be the leader of the community elderly care industry. Even if the community care industry reaches a mature stage, later on, the government will still play a regulatory, guiding, and restraining role.

Guiyang, as one of the cities included in the list of regions for the 2021 Home and Community Basic Aging Service Enhancement Project, has gradually shown a positive development trend in its community aging industry. With the development focus of the municipal government's "Ten Practical Things" for the people, the community elderly care industry is becoming more and more diversified, the quality of services is being improved, and the all-around construction of community elderly care infrastructure has been put on the agenda. The four departments of Guizhou Civil Affairs Department, Guizhou Housing and Urban-Rural Development Department, Guizhou Natural Resources Department, and Guizhou Development and Reform Commission recently issued a notice on strengthening the planning and construction of community elderly service facilities (Qian Min Fa [2022] No. 3), making it clear that the planning and construction of elderly service facilities should be further improved to promote the accelerated development of elderly care. Four departments in Guizhou issued a notice to strengthen the planning and construction of community elderly service facilities. [39] The National Development and Reform Commission, the Ministry of Civil Affairs, and the National Health Care Commission three The general office of the departments jointly issued a notice on the work related to key contact cities to actively cope with population aging, and Guiyang was listed as one of the 61 key contact cities (districts) to actively cope with population aging nationwide.

The existing achievements of Guiyang's community retirement industry cannot be achieved without the preferential policies and convenient environment created by the government, and the perfection and soundness of the industry cannot be achieved without the support and guidance of the government.

**Table 1.** Policy documents related to community care in Guiyang

Document number or time of issue	Document name	Main content
2019-5-20	<i>Reply from the Municipal Civil Affairs Bureau on Proposal No. 41008 of the Third Session of the 12th Municipal Committee of the Chinese People's Political Consultative Conference</i>	Based on the basic situation of community elderly care services in Guiyang, a series of initiatives are proposed to strengthen leadership, improve policies, increase investment and innovative methods, taking into account the lack of funds, unreasonable land planning, and imperfect firefighting procedures.
2020-8-17	<i>Proposals for Improving Community Aging to Proactively Create an Environment for Aging in</i>	Summarising the current situation of community elderly care and the progress of various work, and pointing out that the current industry has problems such as the difficulty of operating community institutions, the lack of elderly care professionals, and

	<i>Place</i>	the lagging development of the elderly care industry, the next work plan mainly includes increasing the supply of services, carrying out home-based services, making intelligent services and making government purchase services.
2021-11-26	<i>Guiyang Gui'an Implementation Plan for Building a "15-minute Elderly Service Circle" in Urban Communities (Draft)</i>	The overall target is to achieve full coverage of street-based elderly service centers and community elderly service stations within the living circle by 2023, and to build a high-quality "15-minute elderly service circle".
2022-1-20	<i>Report on the Implementation of the 2021 National Economic and Social Development Plan and the 2022 National Economic and Social Development Plan (Draft) of Guiyang</i>	To promote the cause of elderly care and childcare and to concretize the objectives, including but not limited to the creation of 11 provincial pilot demonstration units for elderly health work, the completion of 10 care services for infants and children under the age of three and 10 community day care centers for the elderly, and the completion of the renovation of facilities in five public elderly service institutions.
2022-04-11	<i>Implementation Plan for the Promotion of Quality Development of Elderly Care Services in Guizhou</i>	On the basis of the establishment of general objectives, the main tasks for promoting the high-quality development of elderly care and services are dismantled and the corresponding organizational guarantees are emphasized.

## 5 Problems in the development of Guiyang's community elderly care industry

### 5.1 Lack of professional talents in Guiyang's community elderly care industry

In terms of human resources, Guiyang City attaches importance to the cultivation of talents for elderly care services, but there is still a loose staff structure and brain drain within the industry. Guiyang City has issued a series of policies to encourage the setting up of elderly service-related majors in schools through linkage with universities, and courses related to elderly social work and elderly care are offered within the majors to reserve the main force for the future development of the community elderly care industry with the help of universities as a talent training base. However, the training and delivery of senior care professionals require a long gestation period, which is time-consuming and makes it difficult to maintain quality operations during the transition period.

The community aged-care industry is generally characterized by "difficulties in recruiting and retaining workers". At present, the community aged care industry is faced with a shortage of staff engaged in aged care services, a low level of knowledge, an older age (mostly 40-60 years old), low salaries, high work intensity, and low social status, which has led to a serious brain drain. This series of problems reflects the short-

comings in the integration of social forces in Guiyang's community elderly care industry, and the talent introduction and encouragement mechanisms need to be clarified and deepened.

## **5.2 Uneven development of Guiyang's community elderly care industry**

The structural development of Guiyang's community elderly care industry and the distribution of regional development are unbalanced.

In terms of the development of the community elderly care industry in Guiyang, there are shortcomings in the community elderly care industry in Guiyang, such as elderly health promotion and social participation, community elderly care education and training and human resources services, community elderly care financial services, community elderly care technology and smart elderly care services. The types of community elderly care infrastructure in Guiyang City are related to daily life protection areas such as elderly activities and entertainment, catering services, etc. The infrastructure construction of high-level services such as medical facilities, psychological guidance aids, and internet monitoring facilities is relatively weak. Community elderly care services are focused on catering, cleaning, nursing care, leisure and entertainment, and lack medical protection, psychological guidance, and end-of-life care services.

At present, as the main concentration of the elderly population in rural areas, the demand for community elderly care services is more robust, but there is still a large gap in the construction of the elderly care service system between urban and rural areas in Guiyang. Although there are more community service institutions in rural areas than in urban areas, 62 public service platforms for day care for the elderly in urban communities and 441 public service platforms for the elderly in rural areas have been built during the 13th Five-Year Plan period, mainly with government investment, most of the platforms in rural areas are idle, and the services provided are limited to basic recreational activities such as playing cards and mahjong. However, most of the rural platforms are unused and the services provided are mostly limited to basic recreational activities such as playing cards and mahjong. The development of community elderly care services in rural areas has become one of the top priorities for the development of the industry today.

## **5.3 Lack of enthusiasm of participating parties**

The government, as the leading participant in the community elderly care industry, has invested a lot of human, material, and financial resources to meet the needs of the elderly population in Guiyang, but it still needs to mobilize the enthusiasm of other participants. In recent years, Guiyang City has advocated public and private construction, i.e. government investment and private capital to operate elderly care institutions, but the lack of unified standards and operational mechanisms has led to low motivation for other community entities to participate in the construction of the elderly care industry.

For private investment entities, the community elderly care industry market in general presents attributes to be developed. Stable income is a prerequisite for active capital investment, and private capital in the Guiyang area is more than happy to invest in high-

yield areas such as institutional elderly care and elderly real estate. For example, Wudang District has invested in the construction of a national demonstration zone (base) for combined medical and nursing care developed a multi-level and diversified elderly care system combining basic elderly care and elderly real estate and cultivated more than four 50-million-yuan elderly institutions.[40] However, for the community-based elderly care industry, which has unknown development prospects, high risks, low service penetration, slow capital return, and is mainly led by the government, private capital is still holding a wait-and-see attitude and the degree of private capital involvement is low. At the same time, taking into account the economic carrying capacity of the elderly group, the fees for community elderly care services in Guiyang are at a low level, which exacerbates the difficulty of running the main enterprise. Over time, some of the main players have withdrawn from the industrial market. For the time being, the public welfare and social nature of elderly services are not prominent, and the functions and quality of elderly services are difficult to expand and improve as well. [41]

Due to the large initial capital requirements of the community aged-care industry, for example, the source of land for the construction of community aged-care facilities mainly relies on the renovation of old neighborhoods, which means that the community needs to spend a lot of start-up capital, therefore, the community cannot start and sustain the development of the aged-care industry alone without the participation of other subjects.

## **6 Measures for the development of the community elderly care industry in Guiyang**

### **6.1 Governmental subjects**

Focusing on the pursuit of people's welfare, the government is committed to eliminating industrial barriers from the source, combining the current situation of the development of the community elderly care industry in Guiyang, making use of the strategic advantage of Guiyang's big data center according to local conditions, and formulating stronger guiding policies to achieve balanced and rationalized industrial supply.

Faced with the shortage of talents in elderly services, the government should take a two-pronged approach to increase the stickiness of each position. On the one hand, the government, while continuing to improve the maturity of the university's elderly service profession, encourages universities to focus on the cultivation of students' sense of social responsibility and belonging in terms of teaching content, improve the quality of teaching, and professional skills to deliver professional talents for the community elderly care industry. On the other hand, there is a need to strengthen the professional skills training of staff, and the community regularly conducts knowledge seminars. Service delivery and feedback mechanism should be formed in the process of providing elderly care services, monitoring the services of existing talents, improving salaries in the elderly care industry, giving both material and spiritual rewards to high-level talents, and carrying out professional skill level recognition for elderly care workers

through subsidies, tax breaks and awarding titles. The ultimate effect is to attract new talent and maintain existing talent.

In view of the uneven development of the community elderly care industry in Guiyang, the monitoring of services and product quality in the elderly care industry should be strengthened to give play to competitive advantages and encourage healthy competition in the community elderly care industry in Guiyang to form an overall competitive advantage and help improve the overall service quality. At the same time, Guiyang should make use of its status as a provincial capital and a big data center to lay the foundation for the sustainable development of the community elderly care industry by using new-generation information technology products such as the Internet of Things, big data and cloud computing to achieve an accurate match between the density of the elderly population and the spatial distribution of elderly community service facilities, understand the specific needs of Guiyang's elderly population for elderly care services, build a smart health The cloud platform for elderly care, using mobile phone terminals to directly connect the supply side of elderly care services with the demand side, realize the efficient and accurate allocation of resources, create an elderly care service circle, and realize smart elderly care. In addition, in the face of the uneven development of urban and rural industries, the government should give policy preferences and assistance to the relatively backward rural areas, increase financial investment, and accelerate the construction of infrastructure to complete the community elderly industry chain.

For enterprises engaged in elderly health, promotion and social participation, community elderly education and training and human resources services, community elderly financial services, community elderly technology and smart elderly services, the government can adopt a strategy of dispelling concerns and leading income generation, and provide special care by giving industrial subsidies and risk reduction policies in the early stage to alleviate the pressure of enterprise investment, and provide policy protection for the innovative behaviour of enterprises, with perfect The government can take special care of this by giving industrial subsidies and risk reduction policies in the early stages, reducing the pressure on enterprises to invest, providing policy guarantees for enterprises' innovative behaviour, mobilizing the enthusiasm of social subjects through sound policies on enterprise investment protection and industrial welfare, deepening the involvement of private capital and strengthening the close integration between related industries, so as to achieve strong alliances.

## 6.2 Other actors

To achieve the sustainable development of the community elderly industry, in addition to the leading role of the government, it is also inseparable from the triple support of enterprises, communities and family subjects.

Enterprises should comply with the government's call and promote innovation in elderly care services based on policies. For example, they should provide different levels of services for elderly people with different income levels. For high-income retirees, provide high-level services such as shopping on behalf of the elderly, daily maintenance, travel assistance, and recreational activities, and accordingly raise the level of fees to maintain the market players' own operations; while for middle-income and low-



income groups, meet diversified daily needs while lowering fees to attract a larger group of elderly people and cultivate customer stickiness. Secondly, the company should strengthen the exploration and cultivation of professional talents and use its social influence to launch a professional skills competition for elderly people. Thirdly, enterprises should actively cooperate with social welfare and charity organizations to strengthen their sense of social responsibility and to clarify the trend and strategy of industrial development. Finally, enterprises should continue to improve their technological innovation capabilities, increase the return on investment in the community elderly care industry, build a highly efficient online service platform and form unique industrial competitiveness.

Communities can try to build a centralized care system, set up a community care system for the elderly, use the community as a platform to meet the various needs of the elderly, and, while meeting basic material needs, use the resources of the elderly to relieve the pressure of community operation, for example, by forming organizations such as mutual help groups for the elderly, elderly volunteers and elderly associations, which not only strengthen the interaction and communication between community groups but also effectively respond to the group's. This not only strengthens the interaction and communication between the community groups but also effectively responds to the group's need for social values, forming a virtuous circle.

For the main body of the family, on the one hand, children should improve the attention to the elderly in the family, dispel the elderly's rejection of community elderly care, and clearly divide family responsibilities to achieve the harmonious unity of family elderly care, community elderly care, and even institutional elderly care; On the other hand, the elderly groups themselves should cultivate a sense of community belonging, actively participate in various community activities and on the basis of that, strengthen the support security and service support for family care, and at the same time respond to the community's identification of various needs of different elderly groups, reflect their own needs in a timely manner, and promote the community elderly industry service content improvement and quality improvement.

## 7 Conclusion

Developed areas of China's pension industry are booming, and less the study of the pension industry in less developed areas, this paper takes the Guiyang pension industry as the research object, based on Maslow's demand theory, this paper discusses the different types of the elderly pension demand, combined with the Michael Porter Diamond Model, analyzes the Guiyang pension industry development present situation, which is based on the theory of welfare pluralism, From the perspective of different social subjects, this paper puts forward the strategies to promote the development of Guiyang pension industry.

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