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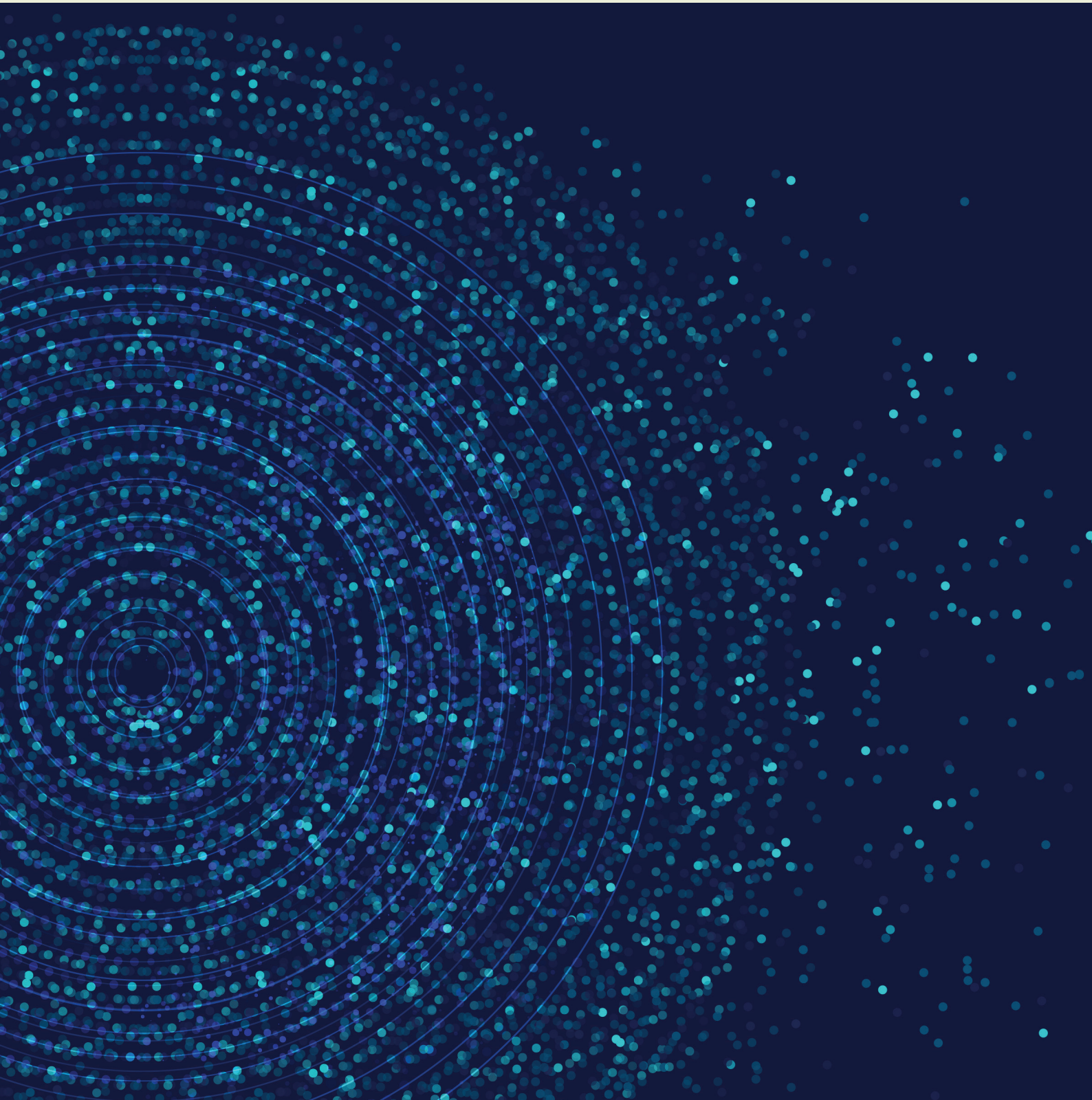
Insight Paper 4:

From Silos to Systems

How tech adoption across health and social care is driving a rethink of the healthcare that supports it.

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How tech adoption across health and social care is driving a rethink of the healthcare that supports it.

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The boundaries between health, social care and specialist education are being dissolved, driven not by policy but by technology used to benefit operations. From fall detection and AI-driven remote monitoring to assistive tools for learning disabilities, tech is taking these areas of care from siloed subsectors to innovative system enablers. As AgeTech, EdTech and Assistive Tech become more of a feature across care models, they're not only transforming service delivery; they're redefining what the built environment must do to support it. For investors and operators alike, this shift demands a strategic rethink of how care spaces are designed and adapted.

EXAMPLES OF TECHNOLOGY ADOPTION WITHIN HEALTH AND SOCIAL CARE

Fall Detection & Intervention: *SafelyYou (USA · founded 2015)
SafelyYou provides AI-enabled camera systems that deliver 99.25% detection accuracy and 99.99% measurement precision, with only one false alarm per sensor every two years. Deployed in over 750 senior living communities, it has been shown to reduce falls by up to 40%, fall-related ER visits by 80% and severe falls by 54% within months of implementation.

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Remote Monitoring & Intervention: **Cera Care (UK/Germany · founded 2015)
Cera delivers more than 50,000 home care visits daily using AI to predict health deteriorations and automate care delivery. The platform has demonstrated the ability to reduce hospitalisations by 70% and falls by 20%, while enabling over 2 million care appointments monthly and supporting 10,000+ professional carers.

These are two examples of how digital and innovative solutions can transform care delivery by increasing capacity without increasing staff headcount (e.g. Cera's 50,000 visits per day) and improving safety and outcomes (SafelyYou's fall and ER incident reductions). For healthcare real estate investors, this is more than operational uplift, it's a shift in how value is created and sustained across modern care environments.

Definitions:

AgeTech
- Technology designed to meet the needs of older adults - supporting safety, independence and wellbeing as people age.
- Smart sensors, falls detection, digital companionship for older adults.

EdTech
- Tools that support education and training. Used in both special education settings and for upskilling clinicians.
- Accessible learning tools for special education and clinician training.

Assistive Tech
- Products that help people with disabilities or impairments carry out everyday tasks more independently.
- Speech-to-text, screen readers, mobility aids.

Source: *safely-you.com, **cerahq.com

EBITDARM & THE TECH MULTIPLIER

Traditionally, EBITDARM (Earnings Before Interest, Taxes, Depreciation, Amortisation, Rent and Management Fees) has been a key performance metric in healthcare real estate, particularly in assessing an operating company's financial health and capacity to service rent.

In today's care economy, where technology is becoming integral to service delivery, there are additional factors to consider in driving EBITDARM. Tech adoption can enhance operational efficiency, reduce staffing burden, increase capacity and create new monetisation pathways, all of which improve operating margins and, by extension, the rent covers that landlords rely on.

Understanding how tech-enabled performance underpins sustainable NOI is critical for real estate investors, especially those chasing stable yield. In WholeCo/ OpCo models, where investors take an interest in both the operating business and the real estate, tech becomes a key lever in both profit generation and value-add strategies.

Simply put, in a connected care economy, the quality of earnings reflected in EBITDARM could be shaped by the degree of digital maturity within the asset and the operator.

As technology reshapes how care is delivered, it is also redefining where value is created. For real estate investors and operators, understanding this shift requires a new lens beyond bricks and mortar to consider how digital tools enhance performance, efficiency and profitability. By looking at the conventional drivers of EBITDARM through this non-conventional, tech-based lens, we can identify where tech delivers measurable returns across the full spectrum of care. From staffing and capacity to monitoring, learning and monetisation, each component of this play on the conventional accounting ratio reflects a lever of strategic advantage in a connected care economy.

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Where technology meets margins: Creating long term value across care

E	B	I	T	D	A	R	M
EFFICIENCY	**BENCHMARKING**	**INTELLIGENCE**	**THROUGHPUT**	**DIGITISATION**	**AUTOMATION**	**RESPONSIVENESS**	**MONETISATION**
Streamlining operations to deliver more with less.	Measuring what matters across services and settings.	Turning data into foresight for better decisions.	Increasing service delivery without increasing headcount or square footage.	Building a connected foundation for care delivery.	Reducing low-value admin and manual work through smart tools.	Reacting faster with real-time insight and intervention tools.	Creating new value through smarter models and asset use.
Example: Digital care management systems reduce paperwork and admin time, allowing staff to focus on residents.	**Example:** Real-time quality dashboards let providers track staff-to-resident ratios, fall incidents and care KPIs.	**Example:** AI-powered fall detection and predictive analytics highlight at-risk individuals based on behavioural and mobility patterns.	**Example:** Remote learning modules for staff training and online specialist education platforms for individuals with learning disabilities.	**Example:** Unified digital records integrate health, education and care data for individuals with complex needs.	**Example:** Automated incident reporting, medication management and shift scheduling platforms.	**Example:** Remote monitoring tools detect deviations in sleep, movement, or vital signs triggering alerts to care teams.	**Example:** Mixed-use real estate offering residential, step-down and specialist education services supported by tech platforms.
Benefit: Frees up capacity, reduces errors, and accelerates reporting.	**Benefit:** Drives consistency across homes and services, including learning disability support and flags areas needing intervention	**Benefit:** Enables early intervention, reducing hospital admissions and improving resident outcomes.	**Benefit:** Supports scalable, flexible models for education and care reducing bottlenecks and expanding reach.	**Benefit:** Improves coordination between services and reduces duplication of effort, vital for people with LD and complex care plans.	**Benefit:** Reduces reliance on overstretched admin roles and supports safer, faster care for residents.	**Benefit:** Improves speed of response to crises, enhances safeguarding and personalises care planning.	**Benefit:** Enables diversified revenue, higher utilisation rates and future-proofing of care infrastructure.

WHY IT MATTERS: TECH IS NOW A VALUE DRIVER IN HEALTHCARE REAL ESTATE

1. Changing User Expectations
The elderly, families, educators and commissioners are beginning to appreciate personalised, tech-enabled care environments. Operators increasingly view digitally-ready real estate as more than just a bonus.

2. Operational Convergence
Blurring boundaries between elderly care, specialist care and supported living requires more flexible, adaptable spaces supporting integrated tech ecosystems. This is especially true for operator groups working across several registration types.

3. Performance & Profitability
Tech can drive occupancy, retention, throughput and staff efficiency, all of which are tied to long-term cash flows, operating margins and asset valuation.

Beyond this, many key industry names are beginning to implement technologies across their portfolios.

With key investors such as Aedifica, set to become Europe's largest healthcare REIT, chasing "future-proof healthcare infrastructure." Welltower*, the world's largest healthcare REIT, has begun rolling out its WBS tech platform across senior communities, aiming to deliver a modern digital experience for residents, families and staff receiving strong early feedback. Greystar** has mentioned integrating voice assistants, smart lighting and thermostats as well as leak detection into residential units to enhance safety, efficiency and comfort. While these examples are not directly linked to some of the aforementioned technologies, they highlight an innovation-aware strategy.

As leading real estate firms focus on successfully embedding tech throughout the asset lifecycle, from acquisition to long-term operations, we can see the benefits, from improved operational efficiency, strengthened operations and ultimately stronger rent premiums. Smart, ESG-aligned buildings can be more resilient to regulatory shifts, operator churn and evolving care models.

Potential Focus Points for factoring technology into the healthcare real estate investment lifecycle

ACQUISITION DUE DILIGENCE (STANDING INVESTMENTS)	ASSET MANAGEMENT & VALUE CREATION	DEVELOPMENT & NEW-BUILD STRATEGY
• Is the building digitally enabled? (Strong Wi-Fi, IoT infrastructure, backup power)	• Retrofit legacy assets with smart infrastructure (IoT sensors, digital dashboards and access control systems)	• Construct tech-ready shells with embedded cabling, modular layouts and sensor-equipped rooms
• Is there an existing tech stack in place? (Fall detection, monitoring, digital records)	• Introduce flexible spaces for blended uses (daytime care, evening education)	• Collaborate with operators and tech providers early in the planning phase
• Is the operator tech-mature and capable of adopting further innovation?	• Track metrics such as fall reduction, staff efficiency, and care quality via integrated tech platforms	• Plan for hybrid care delivery: remote support, outpatient rehab and specialist education

Source: *welltower.com,** greystar.com

Potential Questions for Investors to Ask Going Forward

1. Is this asset ready for remote monitoring, digital care records, or AI analytics?

2. Can this site support cross-sector models (elderly care + LD education + outpatient)?

3. Does the operator have a tech vision and can the real estate support it?

4. How will CapEx for tech upgrades affect returns? If so, how will it be recouped via higher rents or occupancy?

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We like questions. If you've got one about our research, or would like some property advice, we would love to hear from you.

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