

Quantitative Results:

Aging in the Connected Home

Continental Automated Buildings Association (CABA)

Project Steering Committee Meeting Presentation
December 2011

CABA and the following CABA Members funded this Research Project:



The Continental Automated Buildings Association (CABA) is an industry association dedicated to the advancement of intelligent homes and intelligent buildings technologies. CABA is an international association, with over 300 major private and public technology companies committed to research and development within the intelligent buildings and connected home sector. Association members are involved in the design, manufacture, installation and retailing of products for home and building automation. CABA is a leader in initiating and developing cross-industry collaborative research, under the CABA Research Program.

The CABA Aging in the Connected Home 2011 research study is a collaborative, industry-funded research program that brought together organizations from the healthcare sector with connected home solutions providers. As Baby Boomers reach retirement age, 71 million Americans will be over the age 65, in which 90% indicate that they wanted to remain in their homes. As such, home healthcare services, as well as products designed to help the aging adult move through their home and interface with their home in a safe and efficient manner, have seen rapid growth in demand.

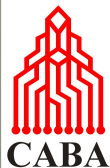
The objective of this study is to determine the key needs of the seniors and their caregivers as they seek to maintain their independence. The Framework for Social Impact is the methodology employed to identify these issues. Understanding the needs of seniors and their caregivers is vital to the design of products, services and home solutions that will enable the aging to maintain their independence in their homes. A thorough understanding of the unmet needs of aging seniors, and their caregivers, as well as the constraints that prohibit them from remaining in their homes, will provide the necessary stimulus for true innovation amongst healthcare providers and home solutions providers in optimizing the development, design and utilization of the connected home.

Organizations that participated in CABA's Aging in the Connected Home 2011 study included: Ascension Health, Ingersoll Rand/Trane/Schlage, TELUS Corporation, and United Health Group.

CABA commissioned The Innovation Partners, an independent market research and consulting firm, to conduct the research study.

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Overall Findings

*The hypothesis that the senior market has significant opportunity in a number of areas that would allow seniors to maintain their independent lifestyle is **CONFIRMED**. Opportunity for new products and services that allow the seniors to conduct the following jobs more efficiently and effectively would be well received by this audience:*

- 1. Managing nutrition – ensuring the senior is getting the right nutrition, easy ways to plan meals and prepare meals, less work to prepare meals, and easily modify diet to accommodate health changes or medical problems*
- 2. Maintain joint health and overall stamina – ensure the seniors are able to move without pain and discomfort and have the stamina they need to conduct the activities they enjoy*
- 3. Manage chronic conditions at home – ensure the senior is adhering to the treatment plan, managing their medications well, and able to detect if there is a change or worsening of the condition*
- 4. Manage finances – ensure the senior knows how their financial accounts are set up, help them manage their accounts online, help them budget and plan for large expenses*
- 5. Remodel or retrofit the home as needed – ensure the senior’s home is free from tripping hazards, clutter, and other situations that make the home dangerous for a senior living alone. There are two major areas of the home that are issues: the cabinets in the kitchen and bath, and the hallways and doorways. When trying to obtain items from cabinets, seniors have trouble reaching high cabinets or deep, low cabinets. When navigating through the home with walkers or other mobility devices they have problems trying to turn in tight hallways and find it difficult to get through doorways.*



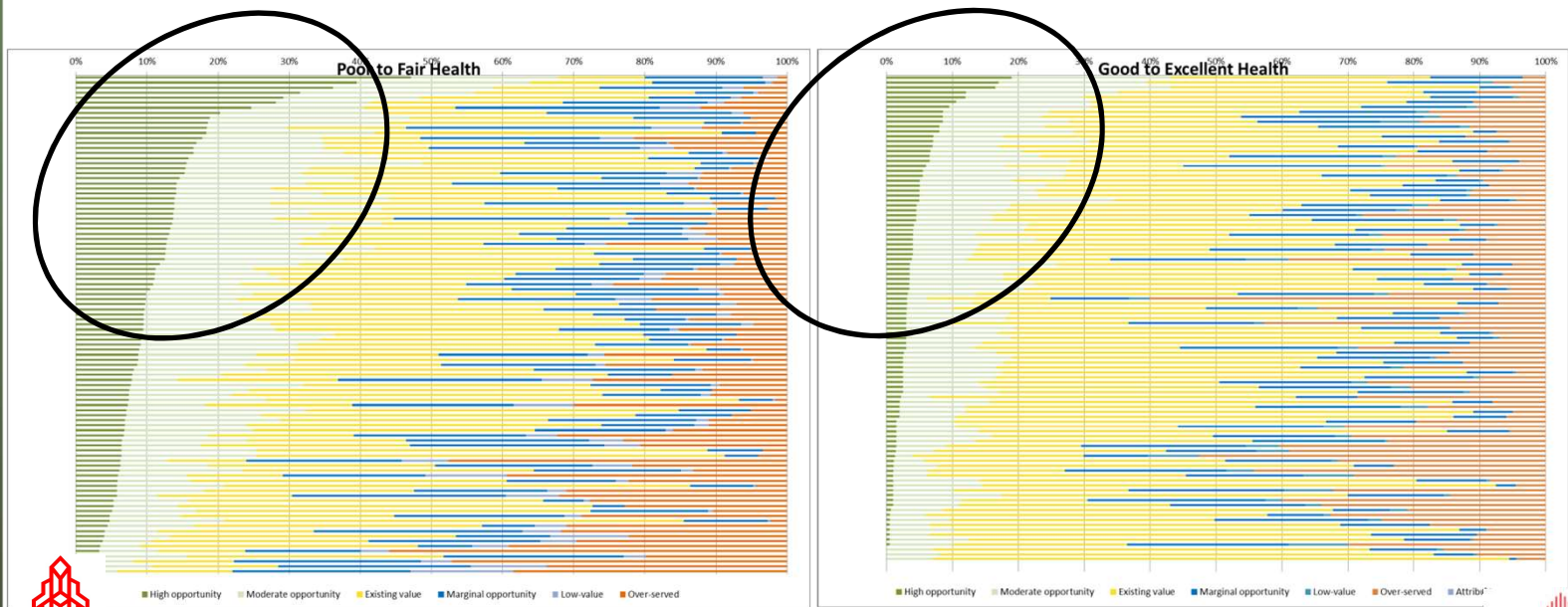


Strong Synergy

*The hypothesis that the caregiver or adult child has significant influence on the senior's decisions regarding living arrangements, products and services to purchase, and managing their health care is **CONFIRMED**. Caregivers have very strong opportunities and they are very synergistic with the needs of the seniors.*

Key Driver of Need – Health Status

More so than age, the health status of the senior played a more important role in the strength of the opportunities



Quality of Life

Not surprising, quality of life is correlated with the health of the individual.

Those with poor health in this survey were much more likely to be females and have only Medicare or Medicaid for their coverage. They are far less willing to pay for any services not covered by their insurance. *

Those with good/excellent health were disproportionately college educated with a graduate or professional degree, and much more likely to have a Medicare supplement. Of these 90% indicated they were willing and able to pay for healthcare and medical services that insurance does not cover.

* While those in poor health had elevated percentages in the income range less than \$25k per year, it was not a statistically significant finding.

Where New Market Value Lies (Daily Living Jobs)

- Tremendous value lies in development of **financial services products** for seniors to:
 - Finance enhancements to their existing home
 - Cover finances associated with the transition from one home to another (or to a nursing home)
 - These types of jobs have a 39-42% high/mod opportunity with 20% or more in the HIGH opportunity range. This is a substantial need.
 - *** Key is in trust – they have a serious concern with being taken advantage of ***
- Services that help seniors and caregivers in the following areas are highly valued:
 - **Organize the home**, remove clutter, arrange items so they are in reach, etc.
 - **Home cleaning services** that prevent the senior from trying to clean hard to reach places that can cause falls
- What an attractive home or retro-fit for seniors would include:
 - **WIDE hallways** – enough room to navigate walking instruments or scooters – with curves that are gradual instead of sharp corners which are also hard to navigate
 - Cabinets that are either not deep or have drawers that allow **easy access to the back of the cabinet**
 - **Lower cabinets** – use upper space for more light or other functions, but not for storage.
- Seniors are already satisfied with many aspects of their homes
 - Ensuring the home is warm enough or cool enough has only 13% in the high/mod opportunity area, with 36% finding this valuable and well served and 31% finding it to be over-served
 - Improving natural lighting in the home has a similar pattern of need
 - Moving from room to room is generally not a problem with 48% well served and 26% over served
 - Ensuring the home is safe from dangers including fire, carbon monoxide, intrusion, etc. is also well served (34% with 44% over served and only 7% with high/mod opportunity)

Where New Market Value Lies (health care related)

- Solutions that help seniors to **improve their diet, plan meals, know what foods to eat** to achieve their health goals are more valuable to those with poor/fair health but also rank high with those in good/excellent health
- Solutions that will enable the senior to **maintain their fitness level, joint mobility, stamina**; they want to be able to conduct the activities they like to do and return to them quickly after a health care incident
- Solutions that will enable seniors and caregivers **know whether a condition the senior is having needs medical attention**, especially whether he/she should go to the ER

The Connected Senior

- Obviously our data will be skewed in this section since we used a web-based survey and panel. Therefore, these numbers should be viewed through this lens
- Comfort with technology
 - 75% are at least comfortable with computer technology
 - 98% have access to a laptop or desktop with Internet and use them regularly
 - 44% use some form of social media
 - Less than 20% use digital entertainment such as digital music or movies and 20% have and use a webcam
 - While 81% have cell phones, only 15% indicate they have a 'smart phone'

Who are you calling old? (emotional jobs)

- Health status is the primary indicator of whether seniors consider themselves 'old'; healthy aging-in people do not even think they are close to being a senior – they see 75+ as old or senior. Marketing to aging-in in any way that implies they are close to being a senior will be a mistake.
- Key to seniors seems to be avoiding negative attention, being seen as a burden, an invalid, or being talked down to. While these are characteristic of 'independence' they also speak to the notion of 'self-reliance' and 'dignity'.
 - As one might expect, these numbers are higher with those in 'poor health' however, they are nearly double that of the total market
- While feeling in control and independent are high opportunity for about 20% of the market, over 50% feel that they are well satisfied with these areas.
- Consistent with these emotional needs is the fear of seniors that they will be unable to handle something that happens to them such as a fall or accident. These are significant constraints for both the seniors and the caregivers – knowing whether the senior has had a problem such as a fall or injury.
 - Interestingly, this fear is not as great for those in poor health, likely indicating that they have already taken actions to make sure they have access to help in the case of a fall or emergency

The Super-Caregiver

- High opportunity emotional jobs for caregivers are interestingly mixed
 - They enjoy caring for the senior
 - They worry about balancing their life with the seniors
 - They want to be the one the senior turns to and be appreciated by the other siblings/family members
 - But they are worried about burnout
- Caregivers seem to perceive the seniors to be more confused about what they are supposed to do than the seniors do
 - Remembering instruction, feeling disoriented, remembering to take medications
 - Opportunity in these cases is about twice as high for caregivers as it is for the seniors

Background



Visual Roadmap – We are at the first step

NOTE: The Innovation Partners would be happy to work with your team, present the findings, facilitate the insights and immersion process, and guide your team through Ideation Portfolio development and your first ideation session.

Facts

1. Results & Strategic Insights

Immersion in the Data

CABA Aging in Place
Seniors Context 3 - Post Crisis

n=230

Category	Attribute	KAS/L	S/L	KAS/A	S/L	L2/L	Service	Rank	Score of High Impact	Count
Get back to my life	Return to a desired level of physical fitness after a medical incident, e.g. stamina, flexibility, strength, etc.	25%	27%	22%	14%	1%	3%	3	55%	229
	Begin functionality that was lost during the incident, e.g. speech, walking, etc.	25%	34%	33%	6%	0%	3%	1	59%	215
	Return to my favorite activities after my injury/illness	18%	25%	30%	14%	2%	2%	14	44%	229

Ecosystem Members

- Senior Advocacy
- Aging Adults
- High Opportunity Need(s)
- High Opportunity Need(s)
- Caregiver

Top Pain Points – Hi-Op Needs

Innovation Partners
A Tandem Strategies, Inc. Company

Opportunity Scores

Aging In Place
Sponsored by CABA

A program for developing innovative products, services, and programs for aging adults to maintain their independence throughout their later years.



Map the opportunity to messaging and the current project pipeline

CABA Aging in Place
Crisis

n=230

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Results Reaction Sheet

Study: _____ Eco-mem: _____

Opportunities: _____

Challenges: _____

Things I'd like to know more about: _____

1b. Extract Insights

Develop Ideation Strategy

Ideation Portfolio for Period of _____ through _____

Social Innovation Challenge:

Ecosystem Members & Role: _____

Time horizon of Total Concept Roadmap:

- 0 to 1 years
- 1 to 5 years
- 5 to 10 years
- More than 10 years

Targeted Objective(s)/Goal for each milestone of the Roadmap (i.e., 3 years, 5 years, etc.): _____

Platform

Current Platform is Comprised of: _____

New Platform Boundaries, Targeted Platform Areas and Other Platform Considerations: _____

Mission Strategies

Existing Platform Strategy as summarized from last Ideation Portfolio: _____

New Platform Strategy as summarized from last Ideation Portfolio: _____

Business Model: _____

Generate Innovations!

Ideation Portfolio for Period of _____ through _____

Social Innovation Challenge	Leader of Strategy/Core Team	Focus of Concepts (Time horizon, platform)	Business Model? Existing or New	Due Date for Concepts from this I.S.

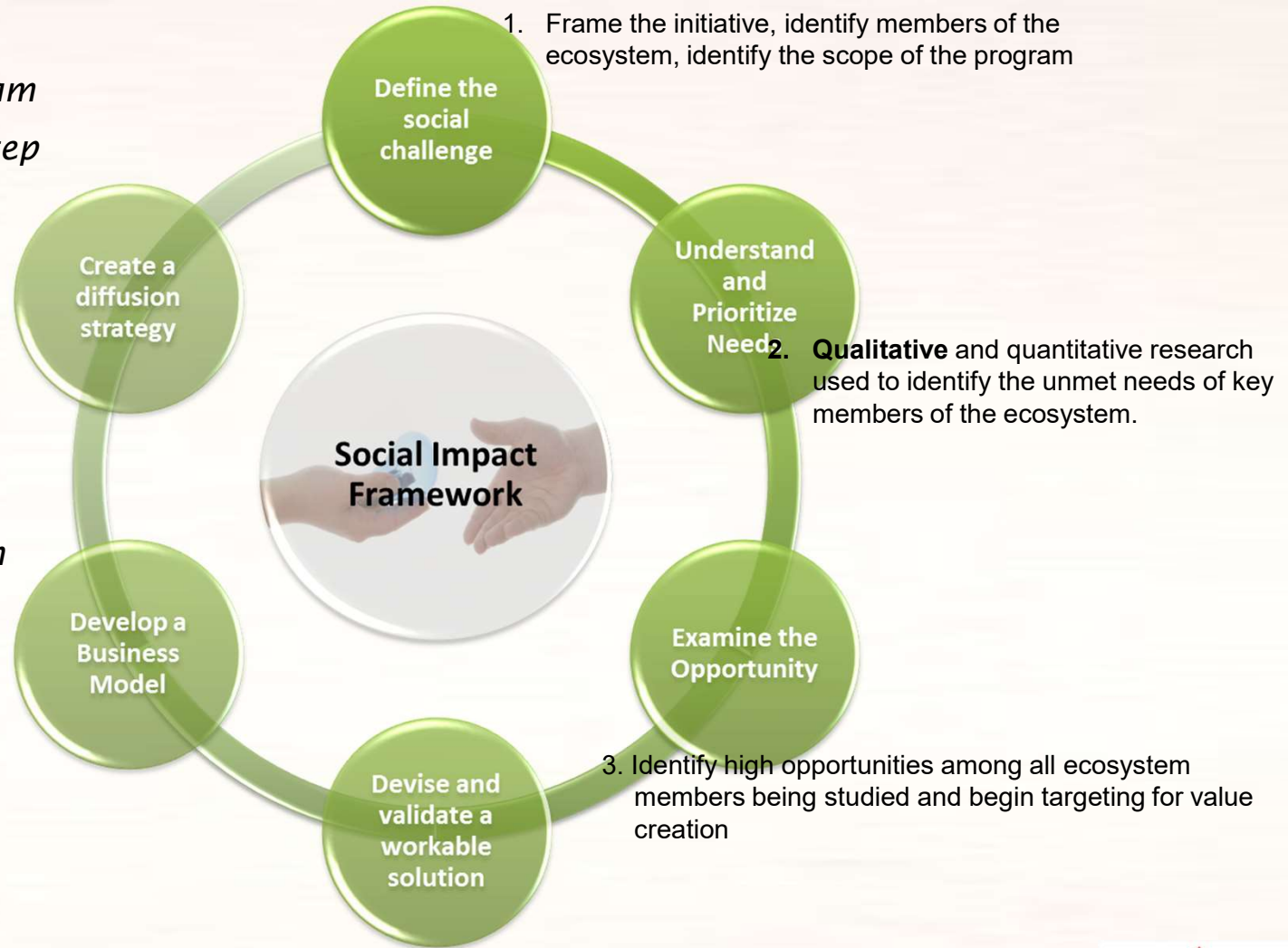
Agenda – RASI

Time	Topic	Tools
10:00 – 11:30	Results Presentation **In order to avoid the waste of paper, we will provide the presentation on a jump drive with all of the associated handouts, reading materials, etc.	Results Reaction Sheet Optional (printed presentation)
11:30 – 12:15	Lunch – working lunch	Discussion of insights, surprises, additional analysis you'd like to see, etc.
12:15 – 1:00	Immersion phase 1 – identify targeted opportunities of both eco-memes	Worksheet – left side, highlighters
1:00 – 1:30	Immersion Phase 2 – map out strengths and areas for new value creation for your organization	Worksheet – Right side, pens – they will be marking how well the solutions meet the needs
1:30 – 2:00	Ideation Portfolio – where will you go from here	Ideation Portfolio example
2:00 – 2:30	Wrap up and next steps	

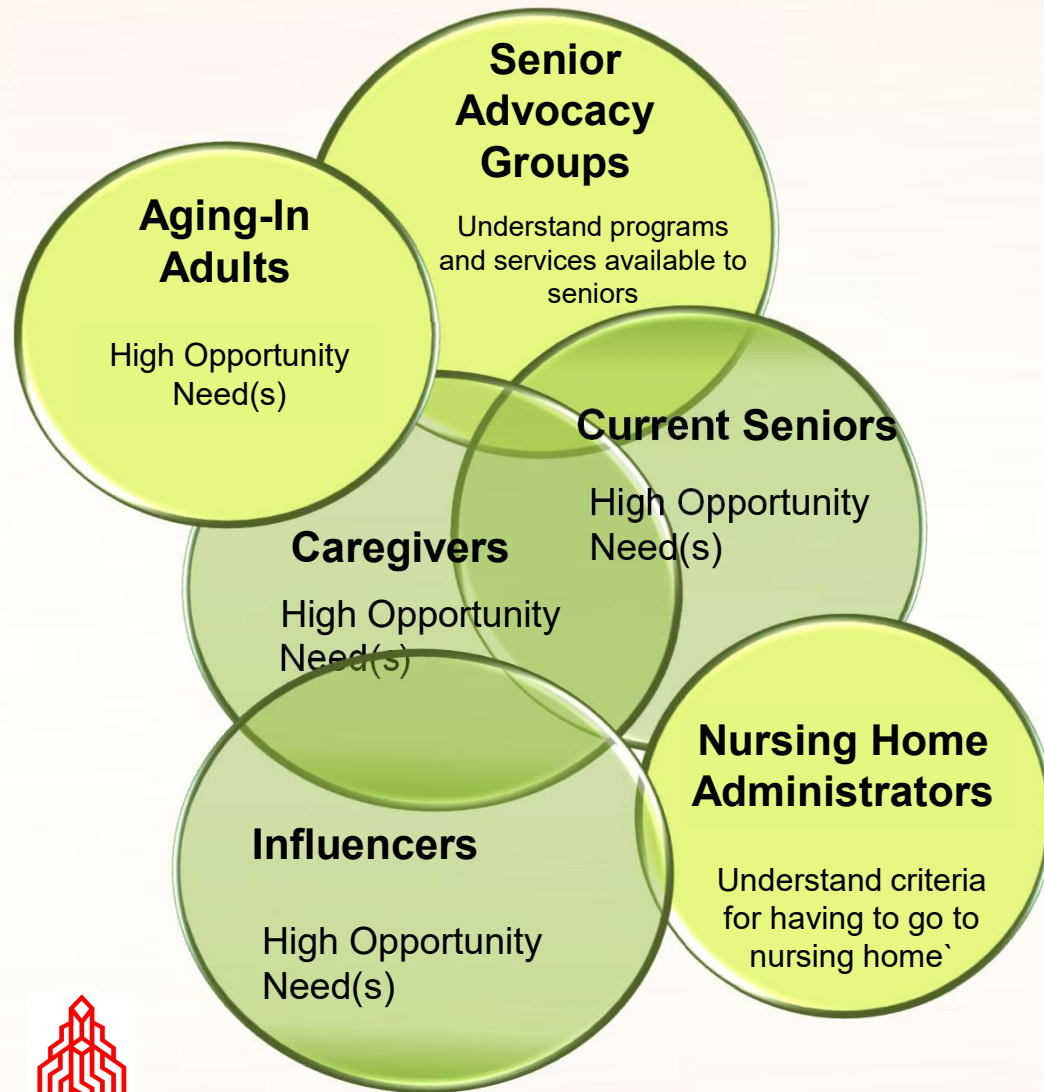
Where will we be at this point? Prepared to use the data for generating new programs, products, and services; prepared to evaluate messaging and initiatives in the pipeline

Methodology

This innovation program was funded through step 2 of the methodology due to the diverse nature of the funding organizations. Each organization will be taking the results forward with their own internal teams.



Ecosystem Members



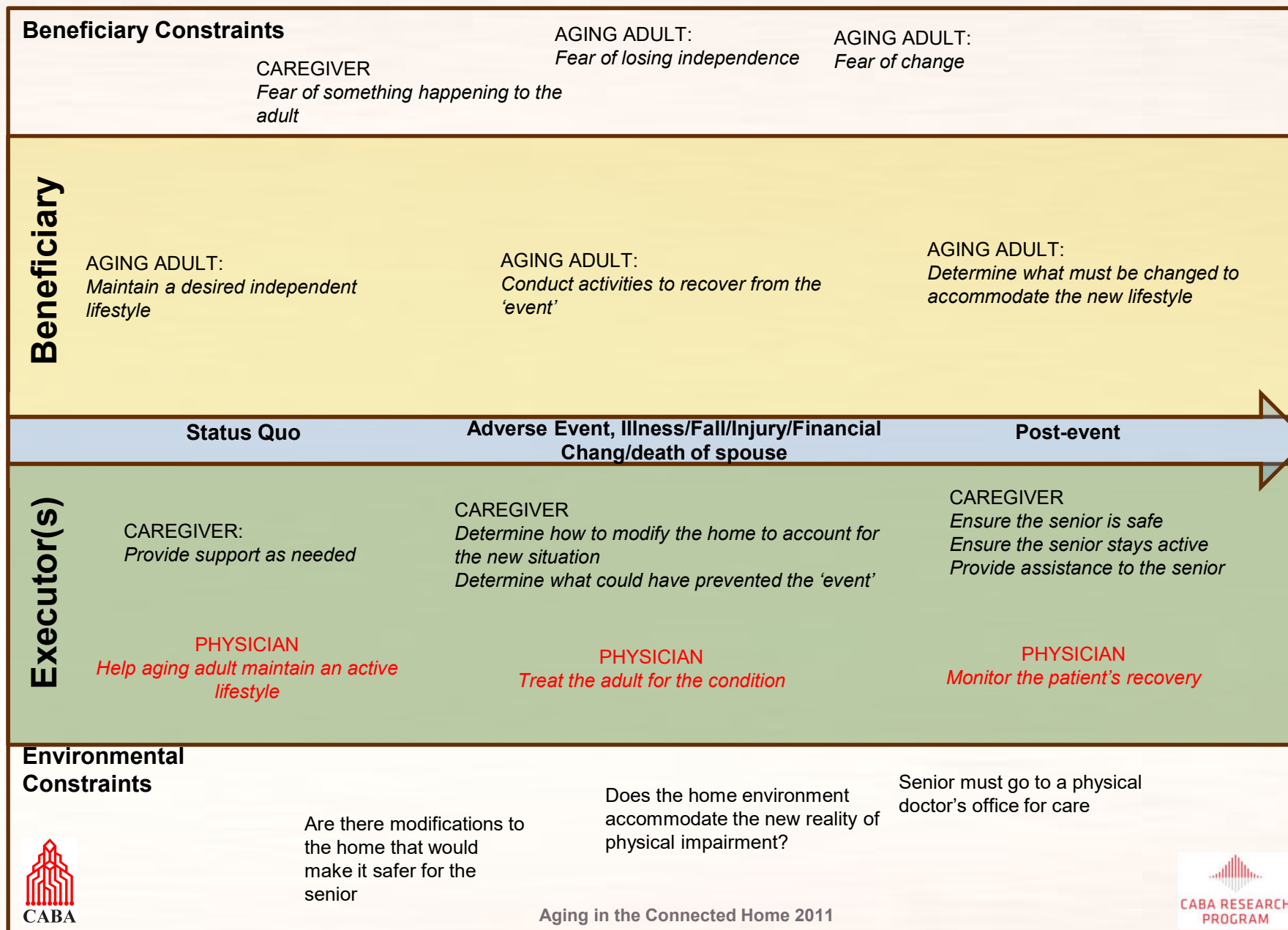
- Only the seniors, caregivers, and influencers were included in the quantitative portion of the study
- We spoke to nursing home administrators, and senior advocacy groups
- Aging-in were ruled out early as they didn't see themselves as 'seniors' or even close

Sample Design

N=500 Seniors	55-64	65-74	75-85	86+	Total
Poor to Fair health	50 (extra 100 sample in Central Texas)	75	100	75	300
Good to Excellent Health	0	50	75	75	200
Total	50	125	175	150	500

N= 400 Caregivers	Adult Child – influencer or non-full time caregiver	Full time Caregiver	Total
Senior fair/poor health (can take 55+)	100	100 (no more than ½ adult child caregiver)	200
Senior good/excellent (must be 65+)	100	100 (no more than ½ adult child caregiver)	200
	200	200	400

Innovation Blueprint

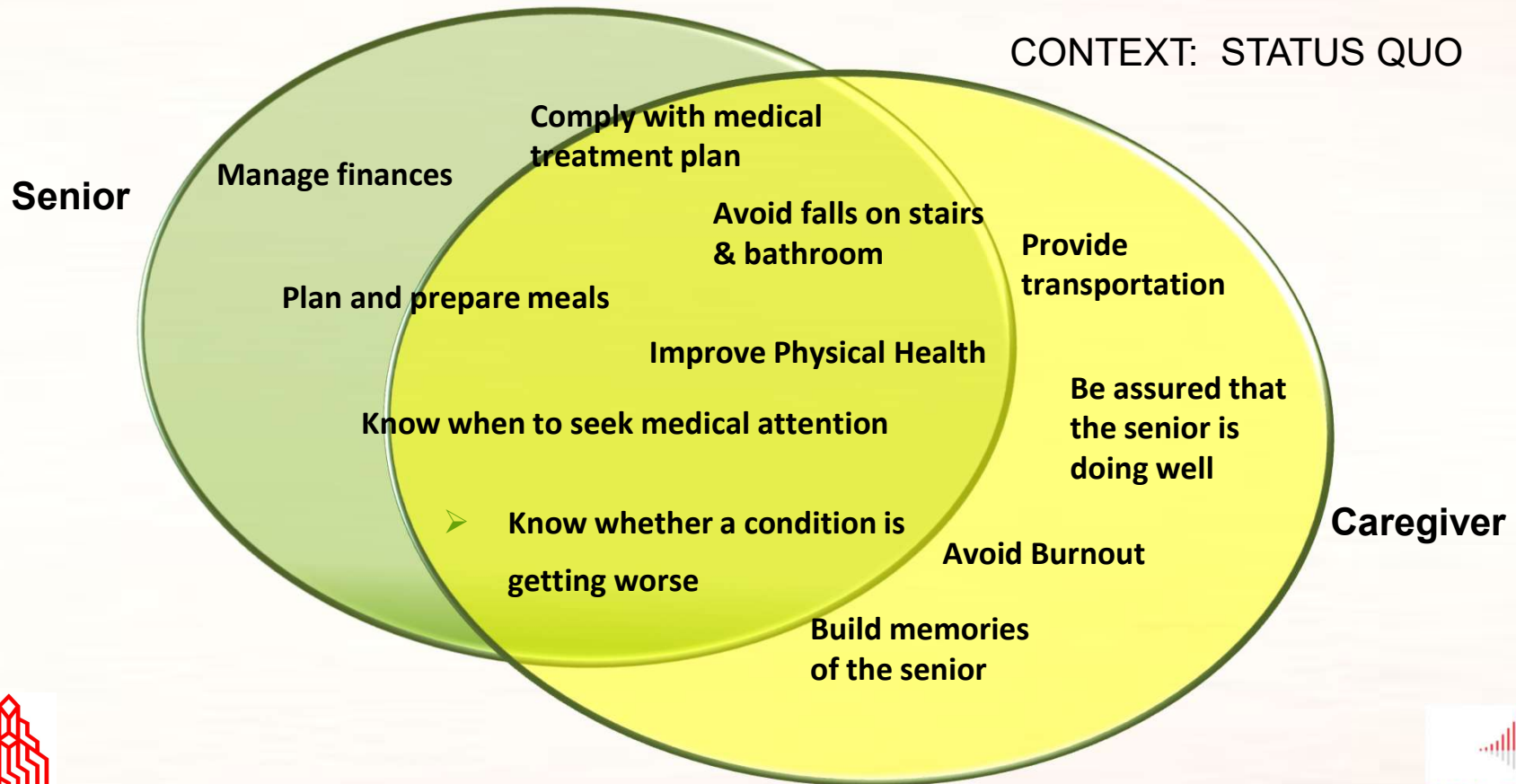




Synergies Across Audiences

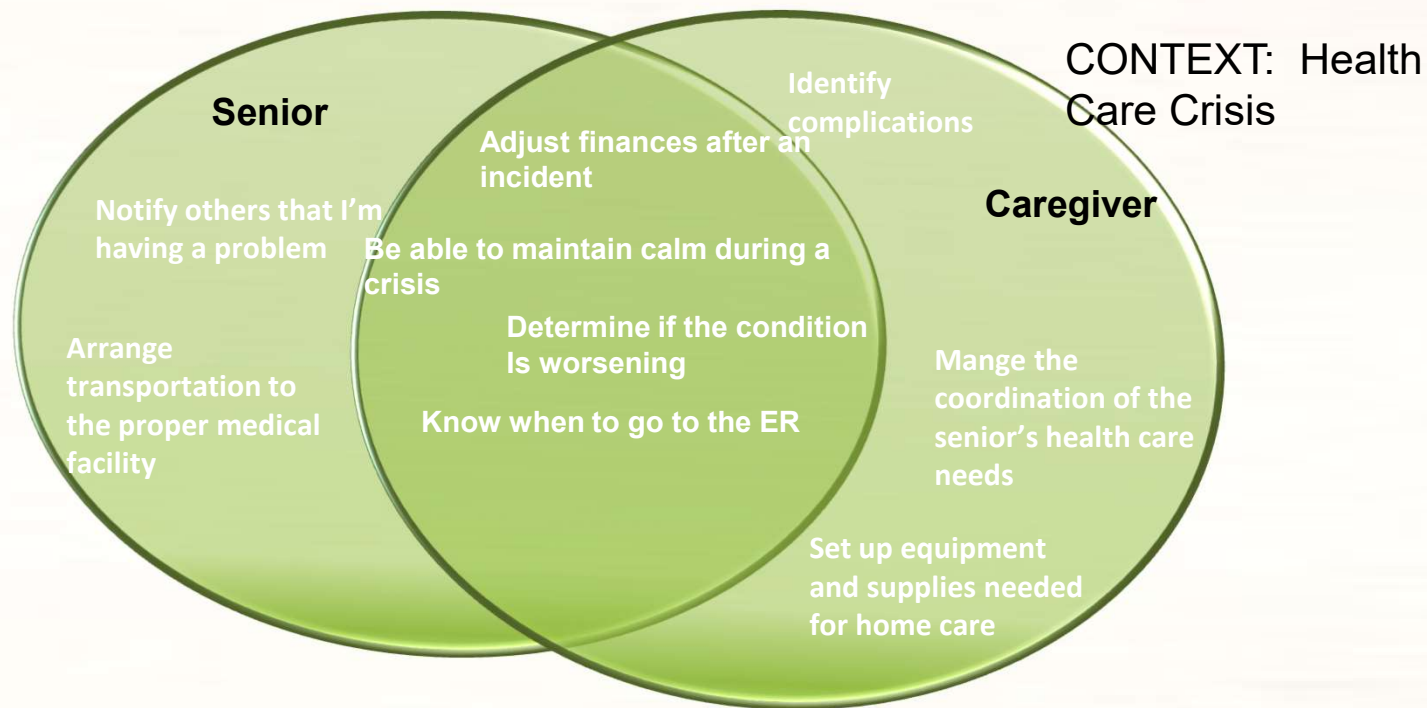
Status Quo – Significant synergy is found

- During the status quo, the emphasis for both parties is around prevention – preventing falls, monitoring chronic conditions, and most of all improving the senior’s health. We will see in later slides what kinds of things they are doing to improve the senior’s health.



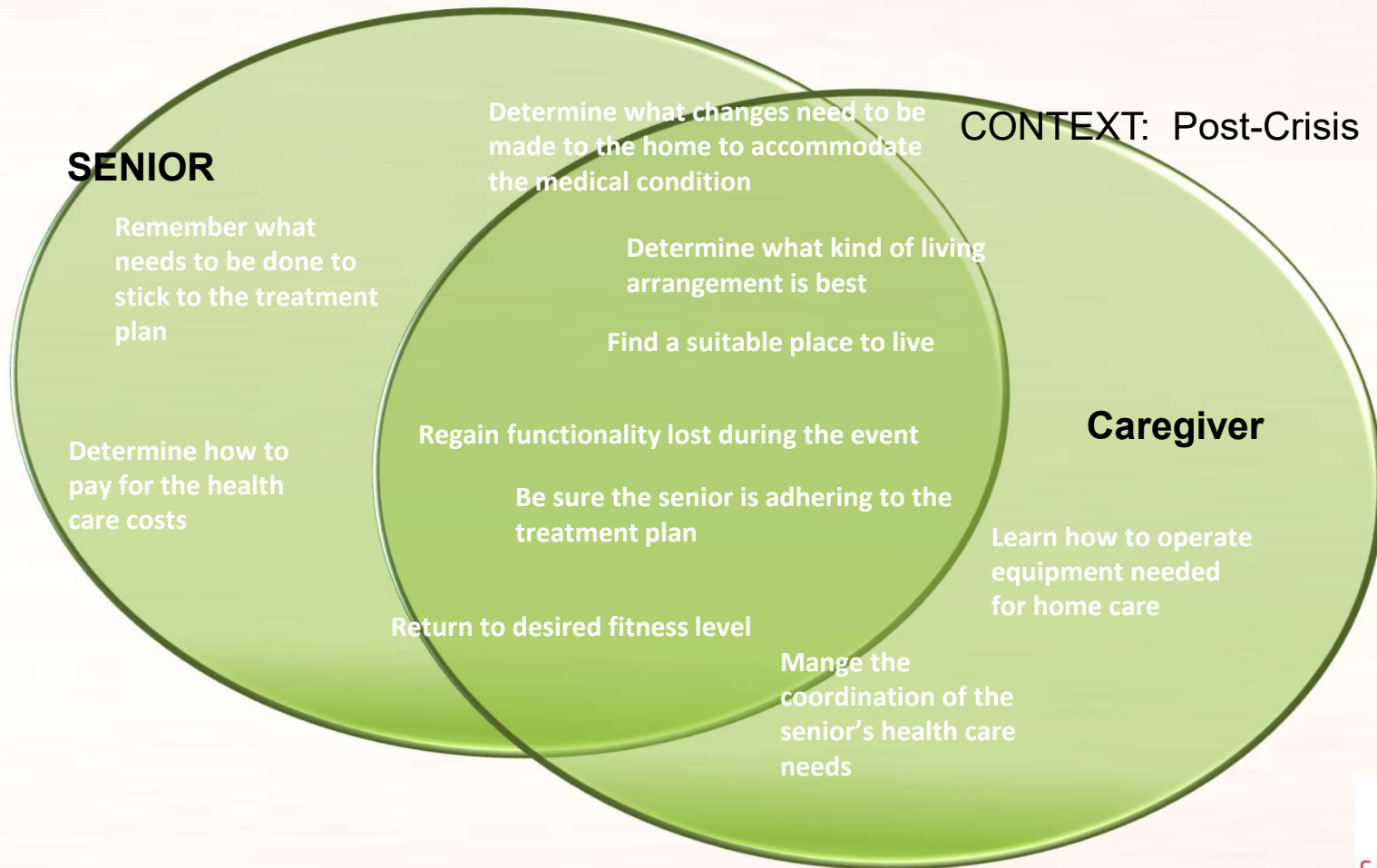
During the Health Care Crisis

- When a healthcare crisis event takes place, there is much concern around knowing when to go to the ER. This is consistent with a finding in the emotional jobs about avoiding being a burden



Post-Crisis

- After the health care incident both the senior and caregiver turn their focus on where to live, regaining lost functionality and getting back to 'normal life'.



Synergies – Personal & Physical Constraints

- Half (5 of 10) of the top ranked Constraints among Seniors are also top ranked among Caregivers
- Much of these constraints speak to a disruptive model being the best solution – one that is less complex, is easier to use, and is more accessible

SYNERGIES for All Seniors' Top Opportunites - Personal and Physical Constraints

Category	Seniors Attribute	Seniors Rank (of 15)	Caregivers Rank (13)	Caregivers Attribute
Personal constraints	If I fell or got hurt and couldn't get to the phone, it might take a long time for someone to find me	2	1	If the senior falls or gets hurt and cannot get to the phone, it might take a long time for someone to find him/her
Personal constraints	I can't operate some of the medical equipment because it is too difficult, e.g., print on the instructions is too small to see, can't see the words on button	3	7	The senior can't operate some of the medical equipment because it is too difficult, e.g., print on the instructions is too small to see, can't see the words
Physical constraints	Mobility devices like walkers, power chairs, etc., are too bulky to use in many parts of the house	4	8	Mobility devices like walkers, power chairs, etc., are too bulky to use in many parts of the house
Physical constraints	Doctors in my area have to see me in person in order to treat me	5	6	Doctors in the senior's area have to see patients in-person in order to treat them
Physical constraints	I don't have access to the exercise equipment needed for physical therapy	8	12	Senior doesn't have access to the exercise equipment needed for physical therapy
Personal constraints	I get confused by all of the instructions after leaving the hospital such as discharge instructions, medication instructions, etc.	9	5	The senior gets confused by all of the instructions after leaving the hospital such as discharge instructions, medication



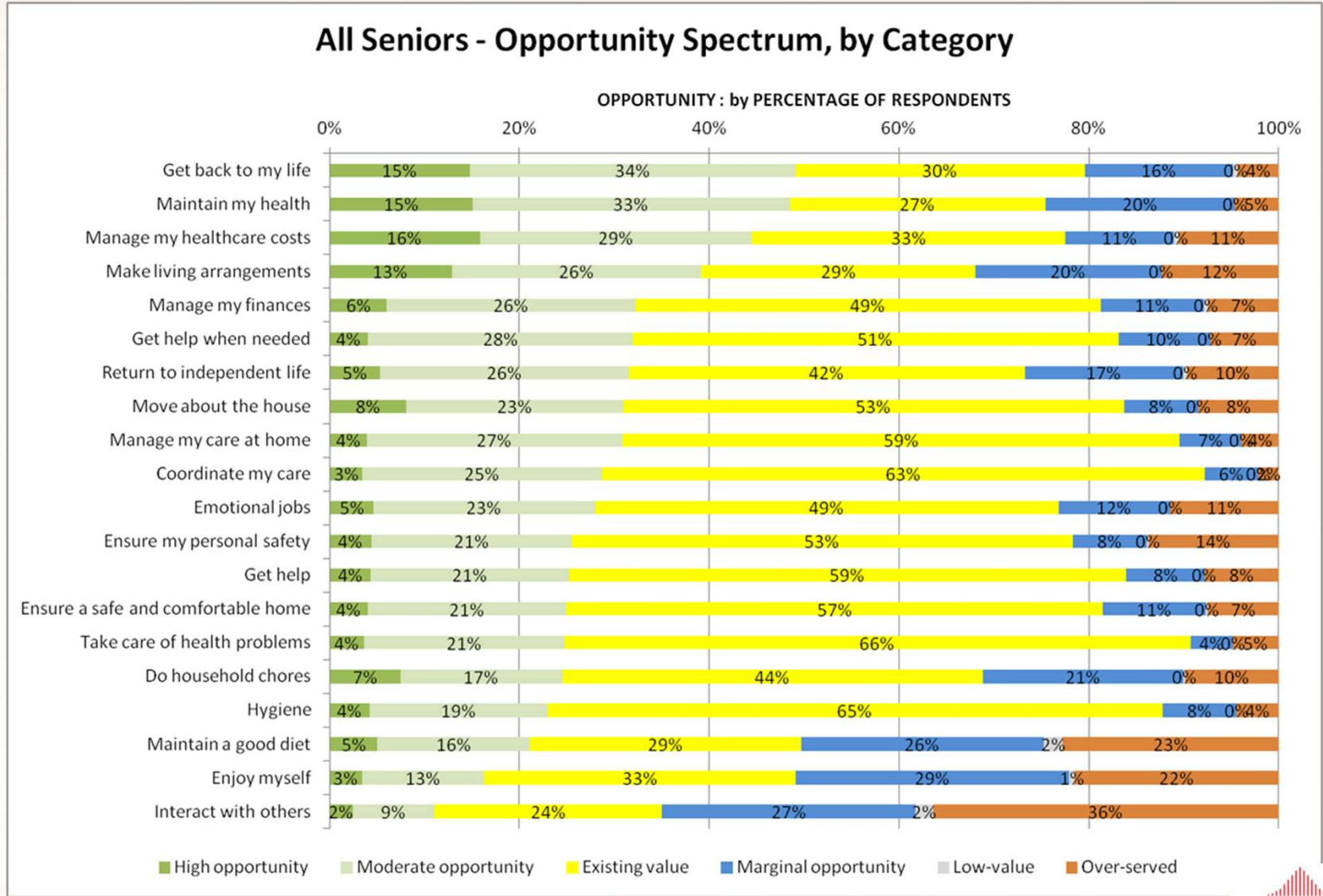
Category-Level Opportunity

How Opportunity Scores Are Determined

OPPORTUNITY RATING

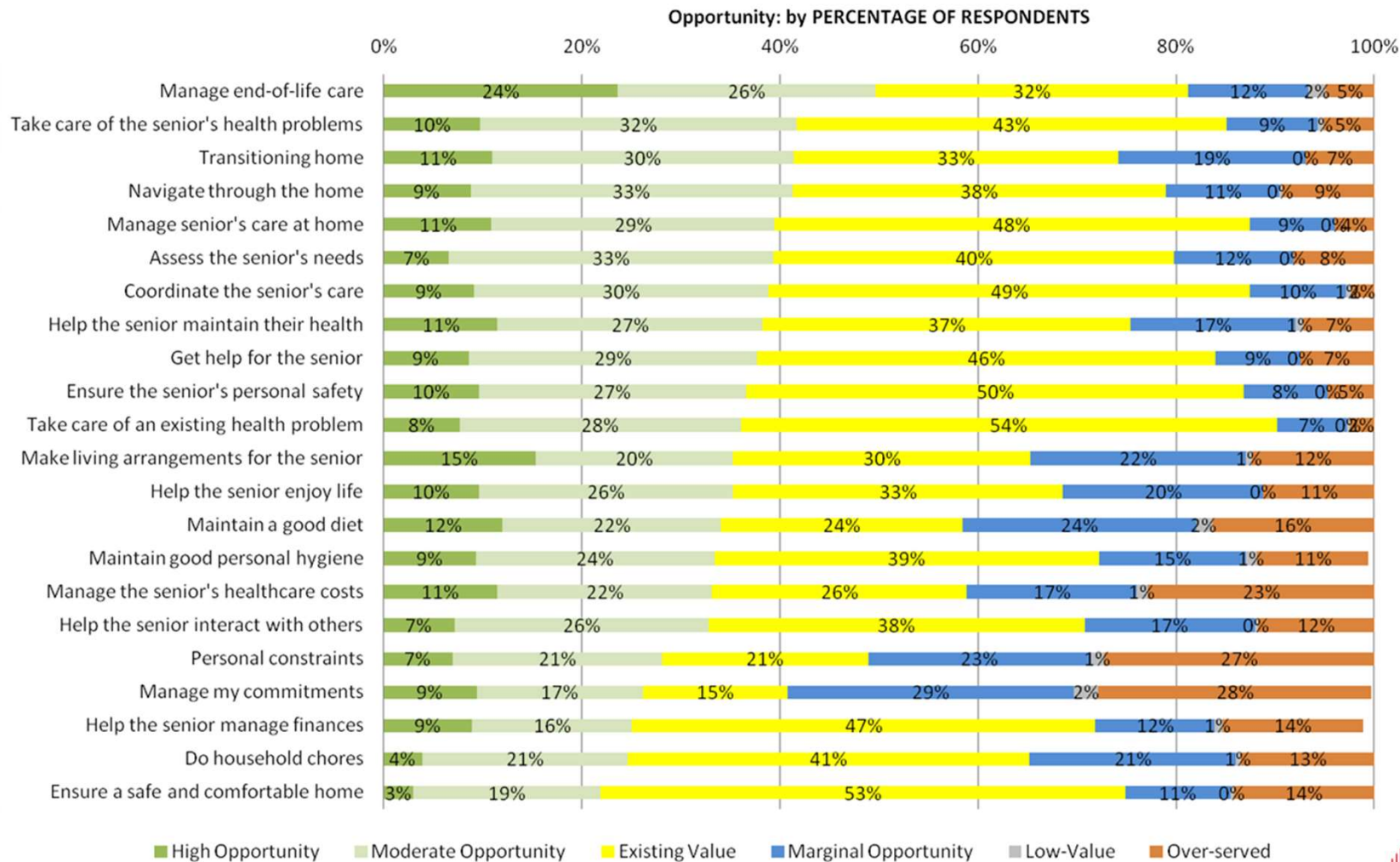
		SATISFACTION RATING				
		1	2	3	4	5
1	Not at all satisfied	-1	-1	0	3	3
		<i>Low value</i>		<i>Marginal opportunity</i>	<i>High opportunity for value creation</i>	
2	Somewhat satisfied	-1	-1	0	3	3
3	Satisfied	-2	-2	0	<i>"On-the-fence"</i> 2 potential 2 opportunity	
4	Very satisfied	-2	-2	-2	1	1
		<i>Over-served</i>			<i>Well satisfied - high existing value</i>	
5	Extremely satisfied	-2	-2	-2	1	1
		Not at all important	Somewhat important	Important	Very important	Extremely important
		IMPORTANCE RATING				
		1	2	3	4	5

Seniors - Category-Level Opportunity Overview



Caregivers - Category-Level Opportunity Overview

All Caregivers & Influencers - Opportunity Spectrum, by Category



Category-Level Opportunity Overview

All Seniors - Opportunites - By Category		
Category	Rank	High + Mod Oppty
Get back to my life	1	49%
Maintain my health	2	48%
Manage my healthcare costs	3	44%
Make living arrangements	4	39%
Manage my finances	5	32%
Get help when needed	6	32%
Return to independent life	7	32%
Move about the house	8	31%
Manage my care at home	9	31%
Coordinate my care	10	29%

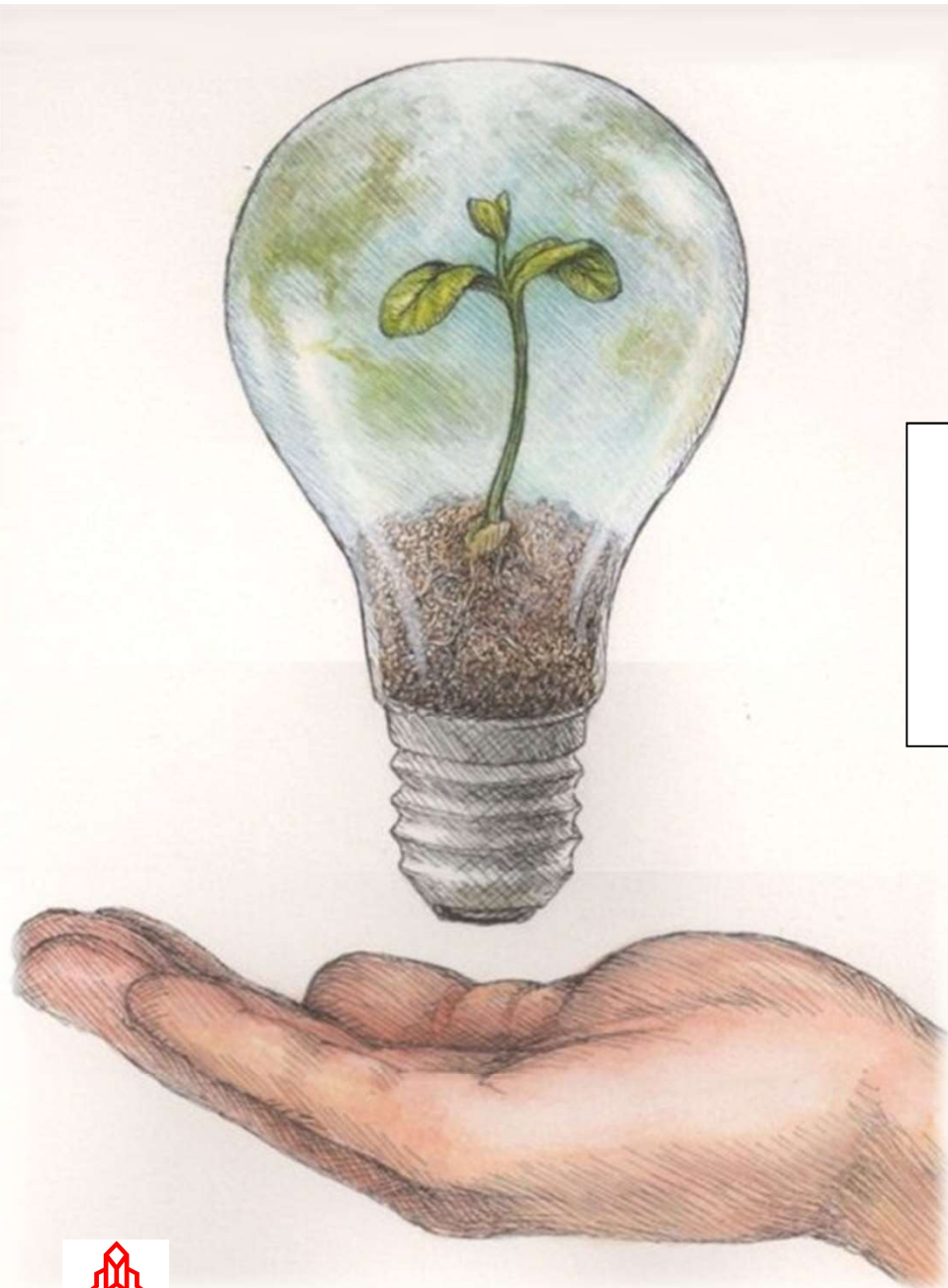
All Caregivers - Opportunites by Category		
Category	Rank	High + Mod Oppty
Manage end-of-life care	1	50%
Take care of the senior's health problems	2	42%
Transitioning home	3	41%
Navigate through the home	4	41%
Manage senior's care at home	5	39%
Assess the senior's needs	6	39%
Coordinate the senior's care	7	39%
Help the senior maintain their health	8	38%
Get help for the senior	9	38%
Ensure the senior's personal safety	10	37%

Blueprint Opportunities



Innovation Blueprint -- Top opportunities by theme

Seniors Constraints			
Being in the hospital is uncomfortable.			
	'Status Quo' Seniors	'Crisis' Seniors	'Post-Crisis' Seniors
Beneficiaries	Improve health & fitness	Manage extra costs	Get 'back to normal'
	Detect illness early	Decide if action is needed	Make new living arrangements
	Relieve financial worry	Get help as needed	Assess healing status
	Maintain an independent lifestyle.	While Sick or Injured...	After recovery from illness or injury
	Caregivers Top Opportunities	Caregivers Top Opportunities	Caregivers Top Opportunities
Executors	Avoid accidents	Facilitate the treatment process	Prepare for end-of-life care
	Observe & Assess	Observe & Assess	Conclude treatment process
	Adhere to treatment plans		Make new living arrangements
Caregivers Constraints			
<p>The senior gets confused by physician's instructions. If senior gets injured, it might take someone a long time to find him/her.</p>			



Emotional Jobs
Opportunities


Emotional Jobs Opportunities

- Seniors walk a fine line between preserving self-determination and acknowledgement of reduced capacity

- Caregiver “burn-out” is their key issue
- Acknowledgement and appreciation are the keys to preventing it

All Seniors - Top Opportunites - Emotional Jobs		
Attribute	Rank	High + Mod Oppty
Avoid feeling like a burden	1	34%
Avoid being talked down to, as if I am incapable of understanding, hard of hearing, etc.	2	31%
Feel in control	3	30%
Avoid feeling like an invalid	4	28%
Avoid feeling sorry for myself	5	24%
Feel independent, e.g., capable of living on one's own	6	23%
Feel secure that I can get help if needed	7	23%
Feel a sense of dignity/respect from others	8	23%
Avoid being the object of attention by others, e.g., stared at, pitied, etc.	9	18%
Feel needed by others	10	15%

All Caregivers - Top Opportunites - Emotional Jobs		
Attribute	Rank	High + Mod Oppty
Avoid 'burn-out' as a caregiver, i.e., ensure that I take care of my own needs too	1	47%
Avoid feeling sorry for myself	2	29%
Avoid feeling overly emotional during the crisis period, i.e. retain a sense of calm	3	29%
Build fond memories before the senior passes away	4	26%
Be appreciated by the other family members	5	25%
Feel appreciated/valued	6	24%
Be perceived as caring	7	21%
Feel a sense of satisfaction in helping someone during a difficult time	8	21%
Feel loved	9	19%
Be perceived as being able to handle it all	10	12%



Status Quo Seniors

Top Senior Opportunities – “Maintaining an independent lifestyle”

All Seniors - Top Opportunites - "Maintain an independent lifestyle"			
Category	Attribute	Rank	High + Mod Oppty
Maintain my health	Maintain a desired level of performance in my joints, e.g., mobility, flexibility, etc.	1	58%
Maintain my health	Improve my physical health, e.g., muscle tone, stamina, flexibility, cardio-vascular health, motor skills, etc.	2	51%
Manage my finances	Ensure I have enough money to live on for the remaining years	3	51%
Maintain my health	Have enough stamina for conducting daily activities	4	50%
Take care of health problems	Understand the signs/symptoms that a chronic condition is getting worse	5	41%
Maintain my health	Ensure I know what changes or symptoms to look for that indicate a problem	6	39%
Ensure a safe and comfortable home	Avoid being physically attacked while on the go, i.e., outside the home	7	38%
Manage my finances	Develop a plan for paying for large, unexpected costs	8	37%
Do household chores	Avoid injury/strain when doing household chores	9	37%
Take care of health problems	Know when to seek medical attention for a chronic condition	10	37%

➤ Key Maintenance themes:

- **Improve health & fitness**
- [Detect illness early](#)
- [Relieve financial worry](#)

Top Senior Opportunities – “Maintaining an independent lifestyle”

➤ Key Maintenance themes:

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➤ Key Maintenance themes:

- [Improve health & fitness](#)
- [Detect illness early](#)
- **Relieve financial worry**



Crisis Seniors

Top Senior Opportunities – “While sick or injured”

All Seniors - Top Opportunites - "While sick or injured"			
Category	Attribute	Rank	High + Mod Oppty
Manage my healthcare costs	Avoid unexpected charges/costs resulting from a health care incident	1	44%
Manage my healthcare costs	Adjust finances after the loss of income, e.g., determine what bills can be paid, determine what changes to lifestyle will need to be made, etc.	2	43%
Coordinate my care	Determine whether the condition is worsening, e. g., new symptoms present, infection, internal bleeding, etc.	3	41%
Manage my healthcare costs	Plan my finances to ensure I can afford my health care costs	4	41%
Manage my healthcare costs	Determine the total amount of the health care costs I must pay	5	40%
Get help	Get assistance in the case of a home emergency, e.g., fire, flood, etc.	6	35%
Manage my healthcare costs	Do paperwork related to health care, e.g., claim forms, requests for records, etc.	7	33%
Get help	Maintain a sense of calm during the incident, e.g., think clearly, don't panic, etc.	8	32%
Get help	Determine if the incident warrants a trip to the ER or can be treated at home	9	28%
Get help	Get transportation to the necessary medical facility	10	27%

➤ Key themes during an illness:

- **Manage extra costs incurred**
- Decide if responsive action is needed
- Get help if needed

Top Senior Opportunities – “While sick or injured”

- Key themes during an illness:
 - [Manage extra costs incurred](#)
 - **Decide if responsive action is needed**
 - [Getting the extra help they need](#)

All Seniors - Top Opportunites - "While sick or injured"			
Category	Attribute	Rank	High + Mod Oppty
Manage my healthcare costs	Avoid unexpected charges/costs resulting from a health care incident	1	44%
Manage my healthcare costs	Adjust finances after the loss of income, e.g., determine what bills can be paid, determine what changes to lifestyle will need to be made, etc.	2	43%
Coordinate my care	Determine whether the condition is worsening, e. g., new symptoms present, infection, internal bleeding, etc.	3	41%
Manage my healthcare costs	Plan my finances to ensure I can afford my health care costs	4	41%
Manage my healthcare costs	Determine the total amount of the health care costs I must pay	5	40%
Get help	Get assistance in the case of a home emergency, e.g., fire, flood, etc.	6	35%
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➤ Key themes during an illness:

- [Manage extra costs incurred](#)
- [Decide if responsive action is needed](#)
- **Get help if needed**



Post-Crisis Seniors

Seniors – “After recovery from sickness or injury”

All Seniors - Top Opportunites - "After recovery from sickness or injury"			
Category	Attribute	Rank	High + Mod Oppty
Get back to my life	Regain functionality that was lost during the incident, e.g., speech, walking, etc.	1	59%
Get back to my life	Return to a desired level of physical fitness after a medical incident, e.g., stamina, flexibility, strength, etc.	2	55%
Make living arrangements	Figure out the best option for a new place to live e.g., based on affordability, transportation, access to medical care, support for	3	50%
Make living arrangements	Avoid being taken advantage of when finding a new place to live	4	46%
Get back to my life	Figure out if I have healed as expected, i.e., things are progressing as expected	5	44%
Get back to my life	Return to my favorite activities after my injury/illness	6	44%
Make living arrangements	Locate a new place to live based on requirements	7	43%
Get back to my life	Learn what physical activities are safe after a medical incident, e.g., progression to return to activity levels	8	43%
Get back to my life	Know how long it will take to recover from the incident	9	43%
Make living arrangements	Figure out how to pay for the transition, e.g., moving costs, deposits, cost of the new place, etc.	10	42%

➤ Key themes after an illness:

- **Get ‘back to normal’**
- [Choose new living arrangements](#)
- [Assess healing status](#)

Seniors – “After recovery from sickness or injury”

All Seniors - Top Opportunites - "After recovery from sickness or injury"

Category	Attribute	Rank	High + Mod Oppty
Get back to my life	Regain functionality that was lost during the incident, e.g., speech, walking, etc.	1	59%
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➤ Key themes after an illness:

- [Get “back to normal”](#)
- **Choose new living arrangements**
- [Assess healing status](#)

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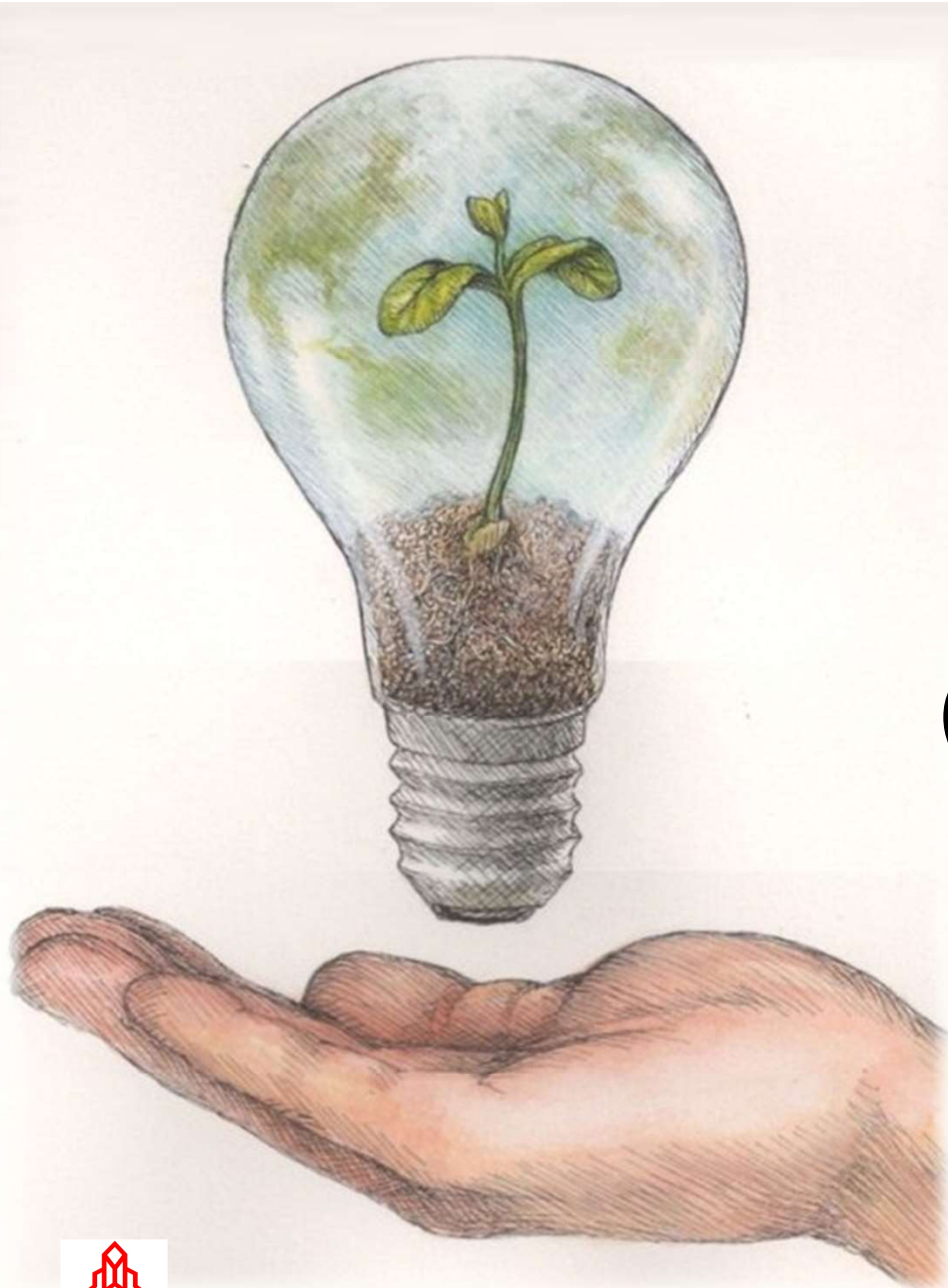
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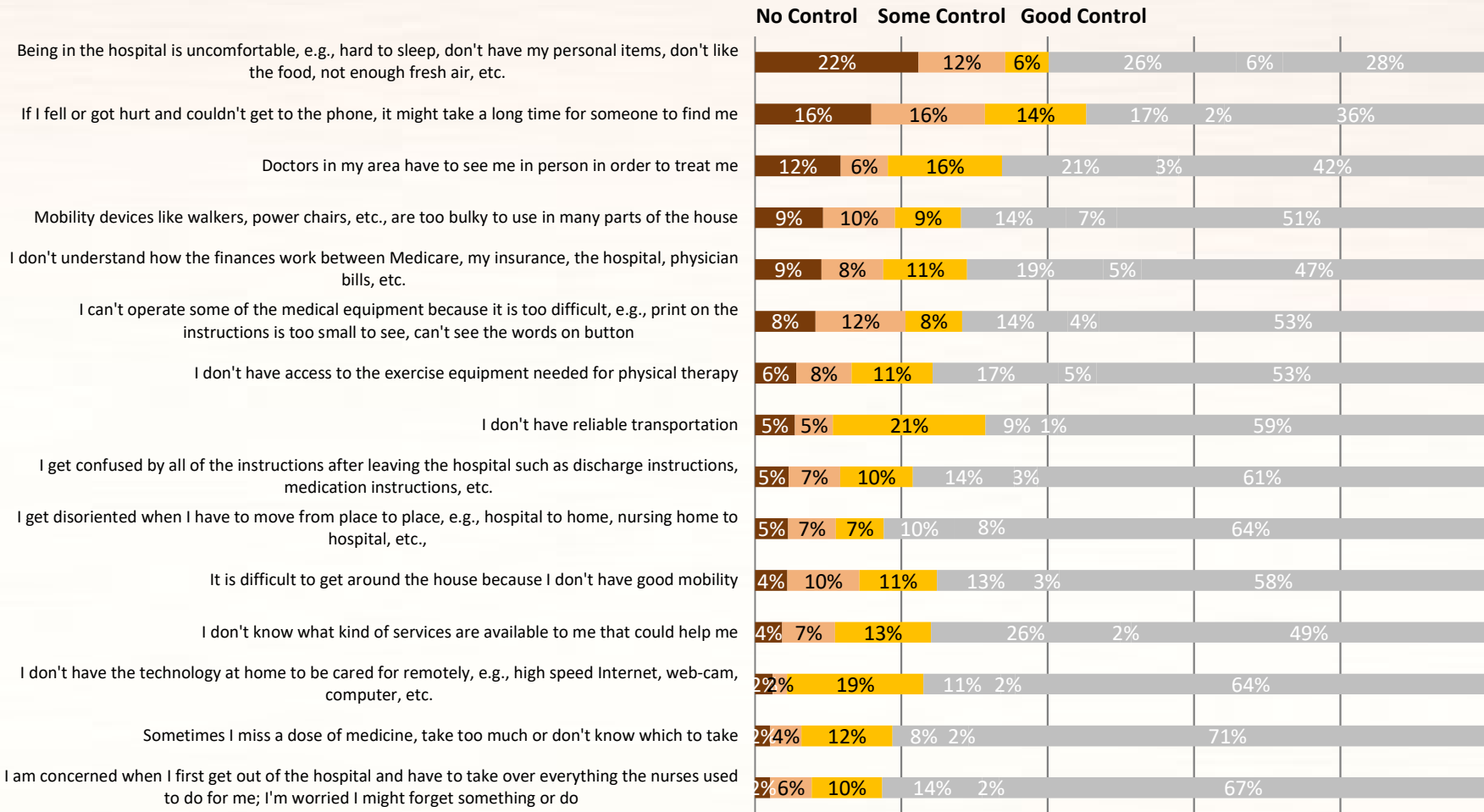
➤ [Choose new living arrangements](#)

➤ **Assess healing status**




Constraints Seniors

Seniors – Personal & Physical Constraints



■ Hi Impact w/ No Control
 ■ Hi impact med control
 ■ Hi Impact Can Control
■ Med Impact No Control
 ■ No Impact No Control
 ■ No Impact Can Control



Status Quo Caregivers

Caregivers – “Help seniors maintain an independent lifestyle”

All Caregivers - Top Opportunites - "Help seniors maintain an independent lifestyle"			
Category	Attribute	Rank	High + Mod Oppty
Navigate through the home	Avoid falls on a slick surface, e.g., water spilled on the floor, slippery floor, etc.	1	50%
Navigate through the home	Avoid falls in the bathroom, e.g., getting on and off toilet, in and out of shower, from water on the floor in the bathroom, etc.	2	49%
Ensure the senior's personal safety	Determine if the senior is incapacitated, e.g., has fallen and/or cannot get up	3	49%
Help the senior enjoy life	Ensure that the senior is not depressed	4	47%
Help the senior maintain their health	Help the senior improve his/her physical health, e.g., muscle tone, stamina, flexibility, cardio-vascular health, motor skills, etc.	5	47%
Assess the senior's needs	Determine whether the seniors can take care of themselves in the case of an emergency	6	47%
Navigate through the home	Avoid tripping on items on the floor, e.g., rugs, clutter, etc.	7	46%
Take care of an existing health problem	Ensure the senior adheres to the treatment plan for their health condition, e.g., medication, diet, exercise, treatments, etc.	8	45%
Take care of an existing health problem	Be sure the senior takes all medications when they are supposed to	9	45%
Navigate through the home	Avoid falls on stairs	10	44%

➤ Key Maintenance themes:

➤ **Avoid accidents**

➤ [Observation and assessment](#)

➤ [Adherence to treatment plans](#)

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➤ Key Maintenance themes:

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➤ [Observation and assessment](#)

➤ **Adherence to treatment plans**



'Crisis' Caregivers

Caregivers – “Help seniors while sick or injured”

➤ Key themes during an illness:

All Caregivers - Top Opportunites - "Help seniors while sick or injured"			
Category	Attribute	Rank	High + Mod Oppty
Get help for the senior	Obtain notification that the senior is having difficulty, e.g., a medical crisis, has fallen, needs help, etc.	1	51%
Get help for the senior	Ensure the senior remains calm during the incident, e.g., thinks clearly, doesn't panic, etc.	2	46%
Coordinate the senior's care	Determine whether the senior's condition is worsening, e. g., new symptoms present, infection, internal bleeding, etc.	3	46%
Take care of the senior's health problems	Determine how the senior is responding to the treatment	4	45%
Take care of the senior's health problems	Determine the extent of support needed, e.g., care giving, day care, etc.	5	41%
Coordinate the senior's care	Ensure that the senior gets the items needed to get well, e.g., prescriptions filled, medical equipment, supplies, etc.	6	39%
Coordinate the senior's care	Work with the health care providers to determine the senior's prognosis	7	39%
Get help for the senior	Ensure help for the senior in an urgent, but not emergency, situation	8	38%
Coordinate the senior's care	Communicate changes in the treatment plan to the senior, e.g., ensure they understand what has changed, how it affects their routine, their medications, etc.	9	38%
Manage the senior's healthcare costs	Avoid unexpected charges/costs resulting from a health care incident	10	37%
Get help for the senior	Determine if the incident warrants a trip to the ER or can be treated at home	11	37%
Coordinate the senior's care	Ensure the senior understands all of the communications from medical professionals	11	37%
Coordinate the senior's care	Help the senior schedule appointments, e.g., follow ups, physical and occupational therapy, home health, etc.	13	37%

➤ **Facilitating the treatment process**

➤ Observation and assessment

Caregivers – “Help seniors while sick or injured”

➤ Key themes during an illness:

➤ [Facilitating the senior’s journey at each touch point in the treatment process](#)

➤ **Observation and assessment**

All Caregivers - Top Opportunites - "Help seniors while sick or injured"			
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Post-Crisis Caregivers

Caregivers – “Help seniors after recovery from sickness or injury”

All Caregivers - Top Opportunites - "Help seniors after recovery from sickness or injury"			
Category	Attribute	Rank	High + Mod Oppty
Manage senior's care at home	Determine whether any complications have set in	1	59%
Manage end-of-life care	Help the senior cope with the pending death, e.g., keep him/her informed, keep the senior comfortable, provide companionship, etc.	2	55%
Manage end-of-life care	Understand the disease progression, e.g., what decisions must be made at which times, how long between stages of the disease, etc.	3	50%
Manage senior's care at home	Ensure that the senior follows the treatment plan at home, e.g., remember the instructions of discharge, manage pain, prevent infection, care for wounds, special diet, etc.	4	46%
Make living arrangements for the	Find a new place to live, e.g., smaller home, apartment, roommate, etc.	5	44%
Transitioning home	Help the senior regain functionality that was lost during the incident, e.g., speech, walking, etc.	6	44%
Transitioning home	Help the senior return to a desired level of physical fitness after a medical incident, e.g., stamina, flexibility, strength, etc.	7	43%
Manage end-of-life care	Help the family cope with the pending death, e.g., what will be happening, help them make necessary decisions, provide support, etc.	8	43%
Make living arrangements for the senior	Determine the best type of place for the senior to live e.g., based on affordability, transportation, access to medical care, support for daily needs, etc	9	43%
Make living arrangements for the	Determine whether the senior can afford to go to assisted living	10	42%

➤ Key themes after an illness:

➤ **Preparing for end-of-life care**

➤ [Concluding the treatment process](#)

➤ [Making new living arrangements](#)

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➤ Key themes after an illness:

- [Preparing for end-of-life care](#)
- **Concluding the treatment process**
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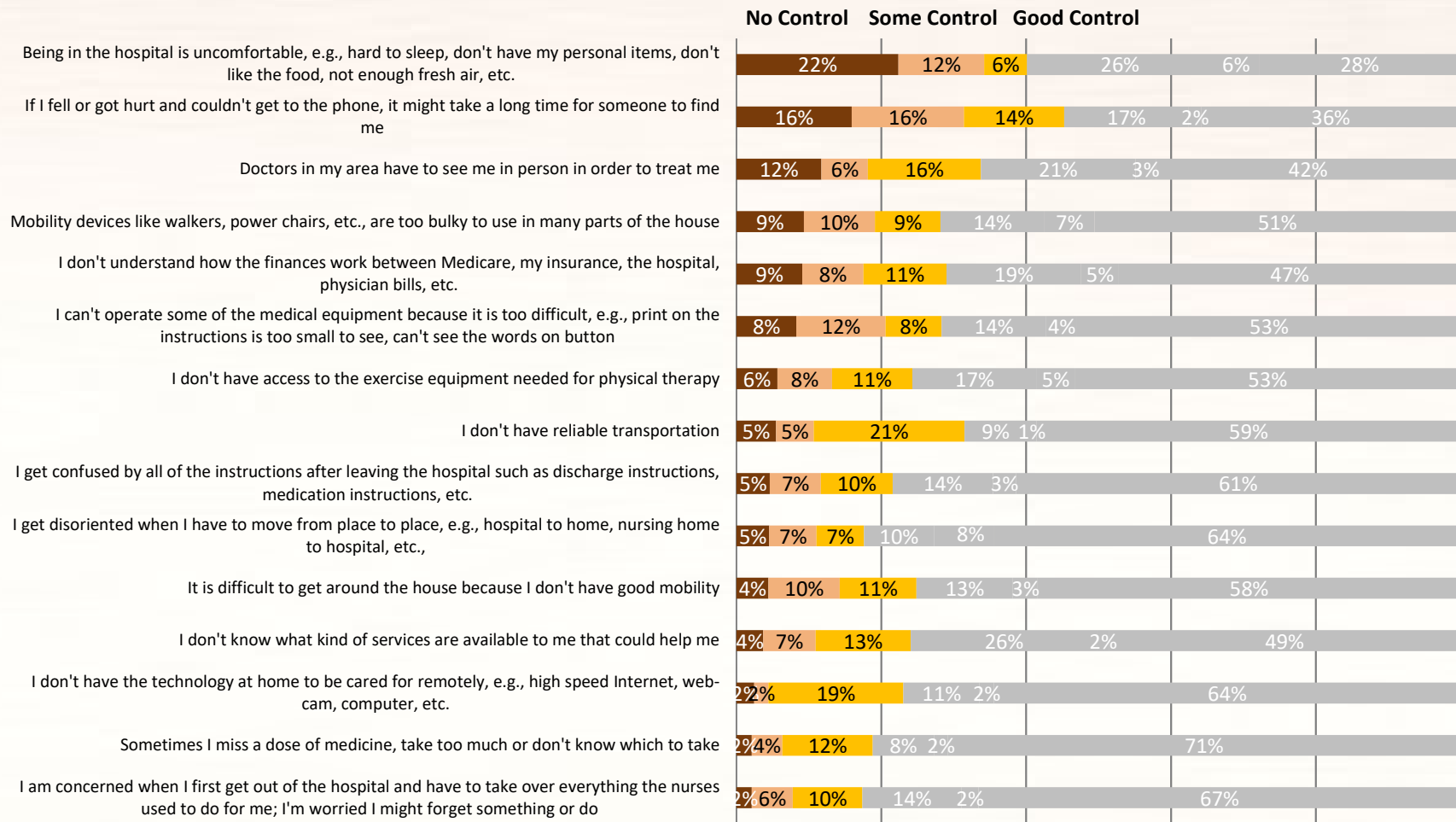
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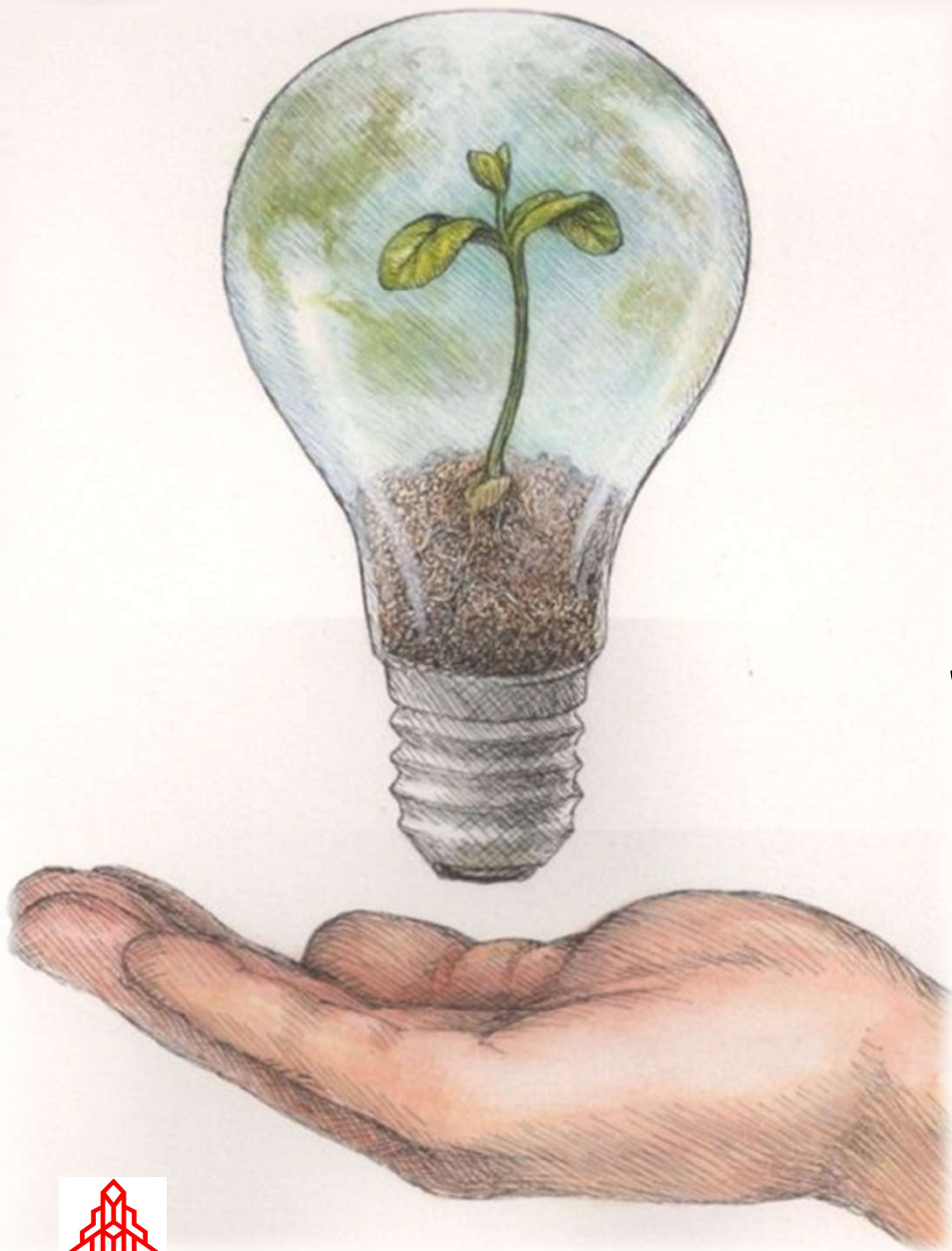
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Status Quo Caregivers



Caregivers – “Help seniors maintain an independent lifestyle”

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Category	Attribute	Rank	High + Mod Oppty
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Navigate through the home	Avoid falls in the bathroom, e.g., getting on and off toilet, in and out of shower, from water on the floor in the bathroom, etc.	2	49%
Ensure the senior's personal safety	Determine if the senior is incapacitated, e.g., has fallen and/or cannot get up	3	49%
Help the senior enjoy life	Ensure that the senior is not depressed	4	47%
Help the senior maintain their health	Help the senior improve his/her physical health, e.g., muscle tone, stamina, flexibility, cardio-vascular health, motor skills, etc.	5	47%
Assess the senior's needs	Determine whether the seniors can take care of themselves in the case of an emergency	6	47%
Navigate through the home	Avoid tripping on items on the floor, e.g., rugs, clutter, etc.	7	46%
Take care of an existing health problem	Ensure the senior adheres to the treatment plan for their health condition, e.g., medication, diet, exercise, treatments, etc.	8	45%
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➤ Key Maintenance themes:

- **Avoid accidents**
- Observation and assessment
- Adherence to treatment plans

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Manage the senior's healthcare costs	Avoid unexpected charges/costs resulting from a health care incident	10	37%
Get help for the senior	Determine if the incident warrants a trip to the ER or can be treated at home	11	37%
Coordinate the senior's care	Ensure the senior understands all of the communications from medical professionals	11	37%
Coordinate the senior's care	Help the senior schedule appointments, e.g., follow ups, physical and occupational therapy, home health, etc.	13	37%

➤ Key themes during an illness:

➤ **Facilitating the treatment process**

➤ **Observation and assessment**

Caregivers – “Help seniors while sick or injured”

All Caregivers - Top Opportunites - "Help seniors while sick or injured"			
Category	Attribute	Rank	High + Mod Oppty
Get help for the senior	Obtain notification that the senior is having difficulty, e.g., a medical crisis, has fallen, needs help, etc.	1	51%
Get help for the senior	Ensure the senior remains calm during the incident, e.g., thinks clearly, doesn't panic, etc.	2	46%
Coordinate the senior's care	Determine whether the senior's condition is worsening, e. g., new symptoms present, infection, internal bleeding, etc.	3	46%
Take care of the senior's health problems	Determine how the senior is responding to the treatment	4	45%
Take care of the senior's health problems	Determine the extent of support needed, e.g., care giving, day care, etc.	5	41%
Coordinate the senior's care	Ensure that the senior gets the items needed to get well, e.g., prescriptions filled, medical equipment, supplies, etc.	6	39%
Coordinate the senior's care	Work with the health care providers to determine the senior's prognosis	7	39%
Get help for the senior	Ensure help for the senior in an urgent, but not emergency, situation	8	38%
Coordinate the senior's care	Communicate changes in the treatment plan to the senior, e.g., ensure they understand what has changed, how it affects their routine, their medications, etc.	9	38%
Manage the senior's healthcare costs	Avoid unexpected charges/costs resulting from a health care incident	10	37%
Get help for the senior	Determine if the incident warrants a trip to the ER or can be treated at home	11	37%
Coordinate the senior's care	Ensure the senior understands all of the communications from medical professionals	11	37%
Coordinate the senior's care	Help the senior schedule appointments, e.g., follow ups, physical and occupational therapy, home health, etc.	13	37%

➤ Key themes during an illness:

➤ Facilitating the senior's journey at each touch point in the treatment process

➤ **Observation and assessment**



Post-Crisis Caregivers

Caregivers – “Help seniors after recovery from sickness or injury”

All Caregivers - Top Opportunites - "Help seniors after recovery from sickness or injury"			
Category	Attribute	Rank	High + Mod Oppty
Manage senior's care at home	Determine whether any complications have set in	1	59%
Manage end-of-life care	Help the senior cope with the pending death, e.g., keep him/her informed, keep the senior comfortable, provide companionship, etc.	2	55%
Manage end-of-life care	Understand the disease progression, e.g., what decisions must be made at which times, how long between stages of the disease, etc.	3	50%
Manage senior's care at home	Ensure that the senior follows the treatment plan at home, e.g., remember the instructions of discharge, manage pain, prevent infection, care for wounds, special diet, etc.	4	46%
Make living arrangements for the	Find a new place to live, e.g., smaller home, apartment, roommate, etc.	5	44%
Transitioning home	Help the senior regain functionality that was lost during the incident, e.g., speech, walking, etc.	6	44%
Transitioning home	Help the senior return to a desired level of physical fitness after a medical incident, e.g., stamina, flexibility, strength, etc.	7	43%
Manage end-of-life care	Help the family cope with the pending death, e.g., what will be happening, help them make necessary decisions, provide support, etc.	8	43%
Make living arrangements for the senior	Determine the best type of place for the senior to live e.g., based on affordability, transportation, access to medical care, support for daily needs, etc	9	43%
Make living arrangements for the	Determine whether the senior can afford to go to assisted living	10	42%

➤ Key themes after an illness:

- **Preparing for end-of-life care**
- **Concluding the treatment process**
- **Making new living arrangements**

Caregivers – “Help seniors after recovery from sickness or injury”

All Caregivers - Top Opportunites - "Help seniors after recovery from sickness or injury"			
Category	Attribute	Rank	High + Mod Oppty
Manage senior's care at home	Determine whether any complications have set in	1	59%
Manage end-of-life care	Help the senior cope with the pending death, e.g., keep him/her informed, keep the senior comfortable, provide companionship, etc.	2	55%
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➤ Key themes after an illness:

- Preparing for end-of-life care
- **Concluding the treatment process**
- Making new living arrangements

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Make living arrangements for the senior	Determine the best type of place for the senior to live e.g., based on affordability, transportation, access to medical care, support for daily needs, etc	9	43%
Make living arrangements for the	Determine whether the senior can afford to go to assisted living	10	42%

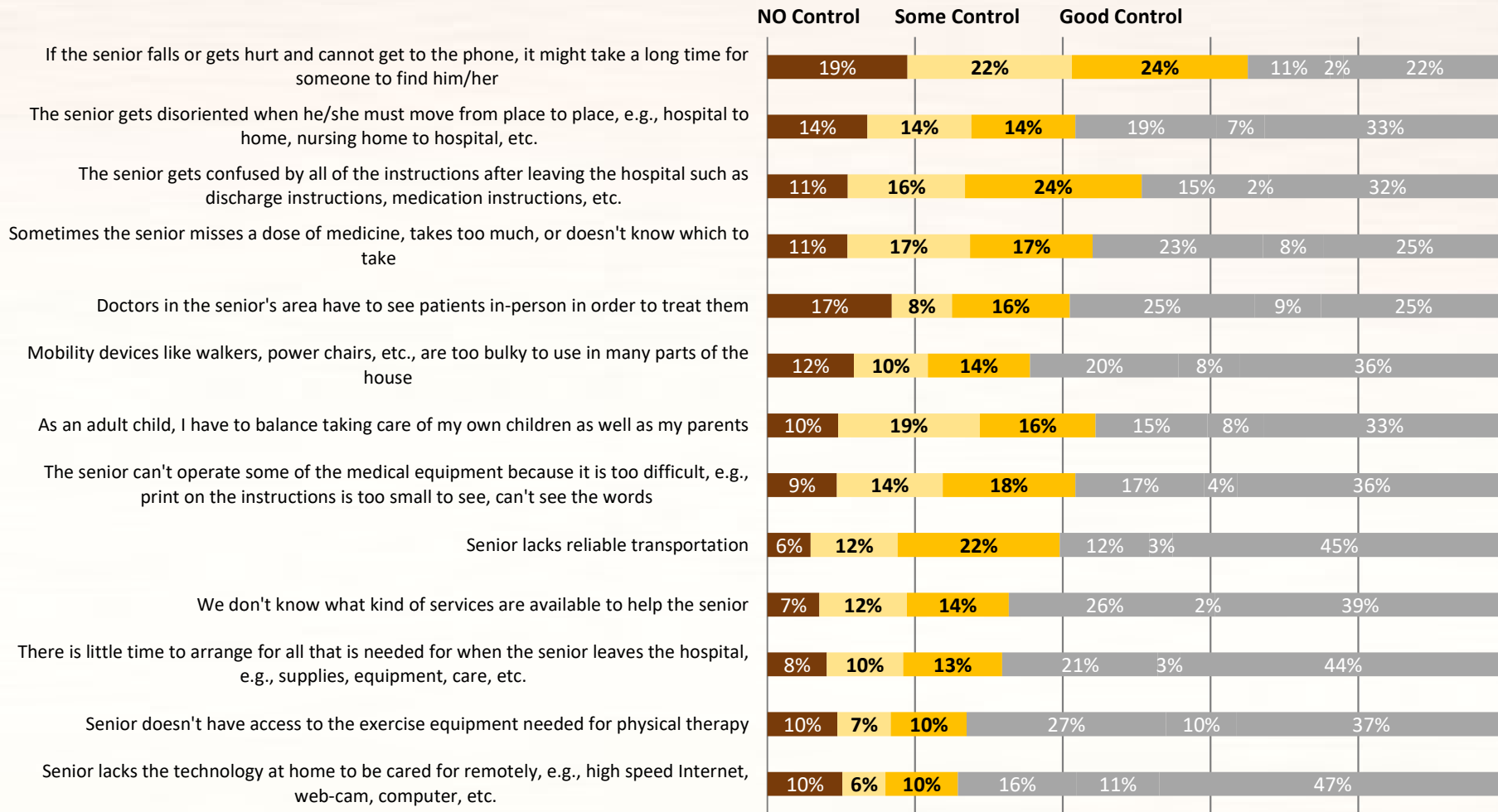
➤ Key themes after an illness:

- Preparing for end-of-life care
- Concluding the treatment process
- **Making new living arrangements**



Constraints Caregivers

Caregivers – Personal & Physical Constraints



■ Hi Impact w/ No Control
 ■ Hi impact med control
 ■ Hi Impact Can Control
■ Med Impact No Control
 ■ No Impact No Control
 ■ No Impact Can Control



Navigate and
Interface with the
Home

How does the home affect the senior's independent living?

- High Opportunity: Financing transition or upgrading to home
 - Figure out how to pay for the transition (42%)
 - Figure out how much a move would cost (40%)
 - Figure out how to finance the needed changes to the existing home (39%)
- Clutter and tripping hazards
- Transporting items throughout the house or into the house after shopping
- Reaching items in cabinets that are deep or low to the ground
- Reaching for items that are too high and can fall on the senior while trying to get them down



Opportunities Drilldowns
- Caregivers &
Influencers

Finding opportunities
within profiling variables

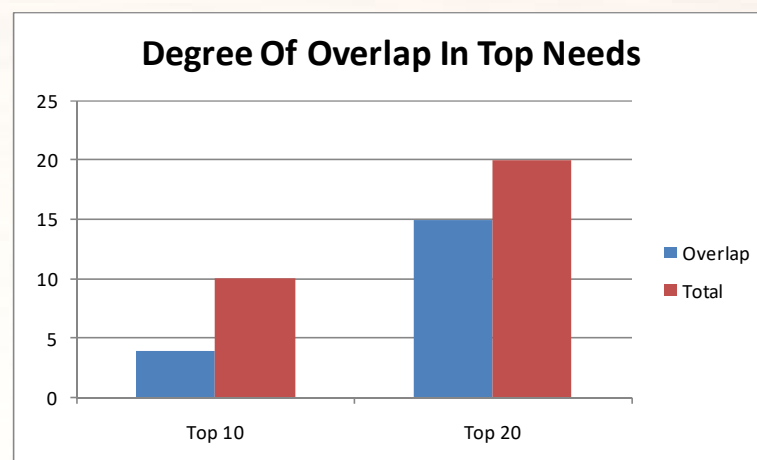
Caregivers vs. Influencers – Some Significant Differences Exist

- Caregivers, i.e. those who actually provide day-to-day assistance to seniors, have a somewhat different opportunity profile compared to Influencers, i.e. those who have influence over key life decisions for the senior and responsibility for oversight of the senior’s health.
- At a macro level, Influencer opportunities are ~30% higher overall than Caregiver opportunities. The reasons are not definitively clear, but we can align several factors:
 - Vast majority of both groups are immediate family and/or spouse, therefore likely feel similar levels of responsibility for the senior
 - The Influencers are much less likely to live with the senior, or in close proximity to them, and therefore see and talk with the senior less frequently than Caregivers
 - One could easily imagine how this combination of circumstances could lead to either lower satisfaction or higher importance ratings among Influencers, thereby driving the higher Opportunity scores
- Not surprisingly, the top opportunities for Influencers revolve around the managing and coordination of care, as opposed to actual delivery of care:
 - *Take care of the senior’s health problems*
 - *Coordinate the senior’s care*
- Influencers are also in need of help with their role of providing oversight (often from a distance):
 - *Ensure the senior’s personal safety*
- For Caregivers, two key episodic opportunities emerge:
 - *Helping the senior to transition back to home after an illness*
 - *Make new living arrangements for the senior*
- Caregivers struggle with work-life balance (and accompanying burnout) relative to providing senior care
 - *Manage my commitments*

Categories - Rank Of High+Mod Oppty			
Attribute	Total	All Influencers	All Caregivers
Manage end-of-life care	1	1	1
Take care of the senior's health problems	2	2	11
Transitioning home	3	9	2
Navigate through the home	4	4	5
Manage senior's care at home	5	5	7
Assess the senior's needs	6	7	5
Coordinate the senior's care	7	3	15
Help the senior maintain their health	8	11	3
Get help for the senior	9	8	11
Ensure the senior's personal safety	10	6	17
Take care of an existing health problem	11	10	14
Make living arrangements for the senior	12	17	4
Help the senior enjoy life	13	12	8
Maintain a good diet	14	15	9
Maintain good personal hygiene	15	13	16
Manage the senior's healthcare costs	16	16	13
Help the senior interact with others	17	14	17
Manage my commitments	18	21	10
Help the senior manage finances	19	19	19
Do household chores	20	18	20
Ensure a safe and comfortable home	21	20	21

Caregivers vs. Influencers – Some Significant Differences Exist

- In the overall context of the study, helping seniors maintain an independent lifestyle, and the 108 individual jobs studied, there are some significant differences between Caregivers and Influencers.
- With a narrow lens, only 4 of the Top 10 opportunities are shared among Caregivers and Influencers in their efforts to help seniors maintain an independent lifestyle
- However, the data suggests that a slightly wider lens is called for, as this wider view reveals that fully 15 of the Top 20 opportunities are consistent among Caregivers and Influencers.
- So while differences certainly exist, these two types of supporting cast members are ultimately more similar than different
- Taken together, these observations would suggest that there is significant innovation opportunities in enabling these two ecosystem members to collaborate and load-balance the tasks of caring for the senior
- In particular, further enabling the remote Influencer to take responsibility for more of the tasks that do not absolutely require physical presence would likely increase satisfaction for both Influencer and Caregiver, and result in better overall care for the senior
- And given the complementary Emotional needs of Caregivers/Influencers who want to avoid burnout, and the Seniors who want to avoid being a burden, the emotional benefits of more collaboration among ecosystem members would deliver significant emotional benefits as well



Influencers and Caregivers have different needs when trying to help the senior maintain an independent lifestyle

- In comparing the Top 10 needs among Influencers and Caregivers, only 4 of 10 are consistent among the two
- Influencers are particularly interested in helping the senior to avoid falls (4 of top 10 needs)
- Note how the magnitude of Influencer needs is significantly higher than Caregiver needs

All Influencers		
Category	Attribute	Sum of High & Mod Oppty
Navigate through the home	Avoid falls on a slick surface, e.g., water spilled on the floor, slippery floor, etc.	56%
Navigate through the home	Avoid falls in the bathroom, e.g., getting on and off toilet, in and out of shower, from water on the floor in the bathroom, etc.	56%
Coordinate the senior's care	Determine whether the senior's condition is worsening, e.g., new symptoms present, infection, internal bleeding, etc.	55%
Navigate through the home	Avoid tripping on items on the floor, e.g., rugs, clutter, etc.	55%
Ensure the senior's personal safety	Determine if the senior is incapacitated, e.g., has fallen and/or cannot get up	54%
Take care of an existing health problem	Obtain notification that there is an emergency	53%
Navigate through the home	Avoid falls on stairs	52%
Take care of an existing health problem	Be sure the senior takes all medications when they are supposed to	51%
Ensure the senior's personal safety	Ensure the senior is not taken advantage of, e.g., scammed, identity theft, etc.	50%
Assess the senior's needs	Determine whether the seniors can take care of themselves in the case of an emergency	50%

All Caregivers		
Category	Attribute	Sum of High & Mod Oppty
Help the senior enjoy life	Ensure that the senior is not depressed	46%
Help the senior maintain their health	Help the senior improve his/her physical health, e.g., muscle tone, stamina, flexibility, cardio-vascular health, motor skills, etc.	46%
Assess the senior's needs	Determine whether the seniors can take care of themselves in the case of an emergency	44%
Manage my commitments	Find someone to care for the senior if I cannot be there	44%
Ensure the senior's personal safety	Determine if the senior is incapacitated, e.g., has fallen and/or cannot get up	42%
Navigate through the home	Avoid falls on a slick surface, e.g., water spilled on the floor, slippery floor, etc.	42%
Navigate through the home	Avoid falls in the bathroom, e.g., getting on and off toilet, in and out of shower, from water on the floor in the bathroom, etc.	41%
Maintain good personal hygiene	Ensure the senior can handle issues with continence	41%
Take care of an existing health problem	Ensure the senior adheres to the treatment plan for their health condition, e.g., medication, diet, exercise, treatments, etc.	41%
Maintain a good diet	Figure out if the senior has any nutrient deficiencies	39%

Influencers and Caregivers have different needs when trying to help the senior manage an illness and return home after recovery

- Despite their different roles, Influencers and Caregivers do have ~50% overlap in their needs when it comes to helping seniors during and after an illness.

All Influencers		
Category	Attribute	Sum of High & Mod Oppty
Manage senior's care at home	Ensure that the senior follows the treatment plan at home, e.g., remember the instructions of discharge, manage pain, prevent infection, care for wounds, special diet, etc.	63%
Manage senior's care at home	Determine whether any complications have set in	60%
Get help for the senior	Obtain notification that the senior is having difficulty, e.g., a medical crisis, has fallen, needs help, etc.	57%
Manage end-of-life care	Help the senior cope with the pending death, e.g., keep him/her informed, keep the senior comfortable, provide companionship, etc.	56%
Take care of the senior's health problems	Determine how the senior is responding to the treatment	54%
Manage end-of-life care	Help the family cope with the pending death, e.g., what will be happening, help them make necessary decisions, provide support, etc.	53%
Take care of the senior's health problems	Determine the extent of support needed, e.g., care giving, day care, etc.	52%
Transitioning home	Provide emotional support when the senior is feeling 'down'	52%
Get help for the senior	Ensure the senior remains calm during the incident, e.g., thinks clearly, doesn't panic, etc.	51%
Manage end-of-life care	Understand the disease progression, e.g., what decisions must be made at which times, how long between stages of the disease, etc.	50%
Make living arrangements for the senior	Find a new place to live, e.g., smaller home, apartment, roommate, etc.	50%
Make living arrangements for the senior	Determine the best type of place for the senior to live e.g., based on affordability, transportation, access to medical care, support for daily needs, etc	50%

- Overlapping needs revolve around areas of major change - either changes to where the senior lives, or coping with end-of-life scenarios
- Note again how the magnitude of Influencer needs is significantly higher than Caregiver needs

All Caregivers		
Category	Attribute	Sum of High & Mod Oppty
Manage end-of-life care	Understand the disease progression, e.g., what decisions must be made at which times, how long between stages of the disease, etc.	49%
Make living arrangements for the senior	Determine whether the senior can afford to go to assisted living	48%
Transitioning home	Help the senior regain functionality that was lost during the incident, e.g., speech, walking, etc.	46%
Manage end-of-life care	Help the senior cope with the pending death, e.g., keep him/her informed, keep the senior comfortable, provide companionship, etc.	46%
Transitioning home	Help the senior return to a desired level of physical fitness after a medical incident, e.g., stamina, flexibility, strength, etc.	45%
Transitioning home	Adjust finances after the loss of income, e.g., determine what bills can be paid, determine what changes to lifestyle will need to be made, etc.	44%
Make living arrangements for the senior	Figure out how to finance the needed changes to the home, e.g., programs or social services that are available, loans, etc.	44%
Make living arrangements for the senior	Find a new place to live, e.g., smaller home, apartment, roommate, etc.	43%
Manage senior's care at home	Determine whether any complications have set in	42%
Make living arrangements for the senior	Determine the best type of place for the senior to live e.g., based on affordability, transportation, access to medical care, support for daily needs, etc	38%

Emotional Needs – Avoiding Burnout & Being Appreciated

- Both Influencers and Caregivers share the struggles with burnout and feeling sorry for themselves in their efforts to help the senior
- Unlike in other needs categories we've studied, the Emotional needs burden/opportunity is higher among Caregivers than among Influencers (by ~20%)
- Caregivers stand out in their need to:
 - *Be appreciated by other family members*
 - *Feel appreciated/valued*
- Caregivers in particular are susceptible to “serving in solitude”, and significant innovation opportunity exists in further developing support systems and a sense of community around this role
- While many Emotional jobs we captured center on avoiding negatives, one positive attribute stands out as having solid innovation opportunity:
 - *Build fond memories before the senior passes away*

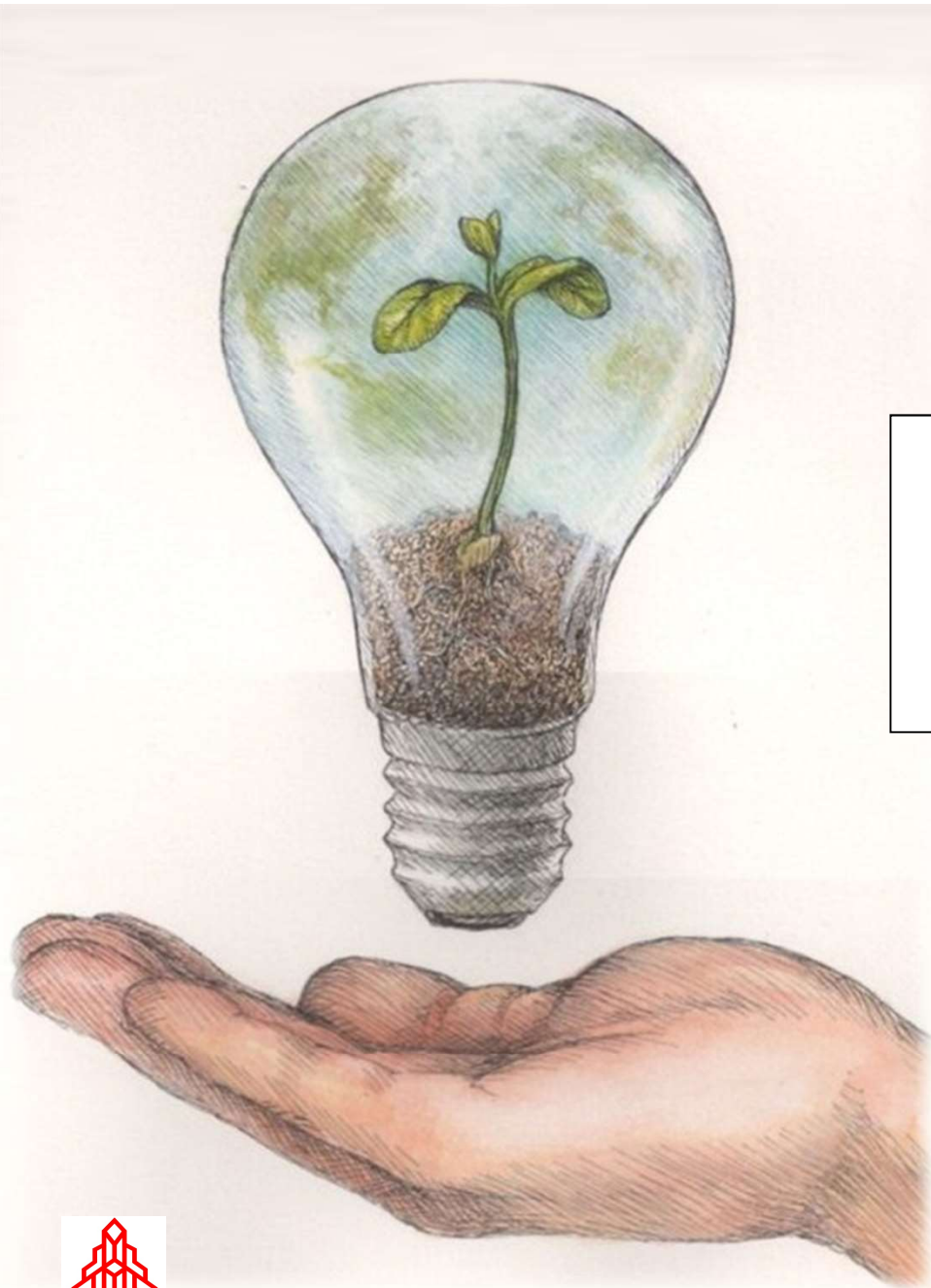
All Caregivers - Top Opportunites - Emotional Jobs						
Attribute	Total		Influencer		Caregiver	
	Rank	High + Mod Oppty	Rank	High + Mod Oppty	Rank	High + Mod Oppty
Avoid 'burn-out' as a caregiver, i.e., ensure that I take care of my own needs too	1	47%	1	44%	1	50%
Avoid feeling sorry for myself	2	29%	3	25%	2	34%
Avoid feeling overly emotional during the crisis period, i.e. retain a sense of calm	3	29%	2	31%	6	26%
Build fond memories before the senior passes away	4	26%	4	24%	5	28%
Be appreciated by the other family members	5	25%	6	20%	3	31%
Feel appreciated/valued	6	24%	7	20%	4	30%
Be perceived as caring	7	21%	8	18%	7	25%
Feel a sense of satisfaction in helping someone during a difficult time	8	21%	5	22%	9	19%
Feel loved	9	19%	9	17%	8	21%
Be perceived as being able to handle it all	10	12%	10	12%	10	11%



Opportunities Drilldowns

Finding more
opportunities within
profiling variables

Dynamic Analysis
Worksheet
(available for purchase)



Sample Profile Analysis

Profiling survey
respondents & assessing
representativeness

Seniors – Basic Demographic Profile

- Further follow up – review sample profile against Census and/or AARP data to assess representativeness. Some bias likely exists due to online panel limitations.

All Seniors - Basic Demographic Profile	
Category	Percent
Age	
55 - 64	10%
65 - 74	25%
75 - 85	36%
86+	29%
Please rate your level of health or wellness	
Poor health	7%
Fair health	53%
Good health	33%
Excellent health	8%
Please indicate gender	
Male	57%
Female	43%

All Seniors - Basic Demographic Profile	
Category	Percent
What kind of home do you live in?	
A single family house	71%
A condominium	12%
An apartment	5%
Other	11%
What is your ethnicity?	
Caucasian/ White	95%
African American/ Black	1%
Hispanic/Latino	1%
Asian	1%
Of mixed race/ biracial	1%
Other	1%

Seniors – Caregiver Profile

- Most Seniors do not have a Caregiver
- Of those who do it is overwhelmingly likely to be a family member, often living in the same household

All Seniors - Caregiver Profile	
Category	Percent
What kind of caregiver helps you most frequently?	
<i>I don't have a caregiver</i>	66%
<i>Other family member</i>	19%
<i>Adult child</i>	7%
<i>Paid caregiver</i>	3%
<i>Friend</i>	2%
<i>Other</i>	3%
Does your caregiver live in your home?	
<i>Yes</i>	64%
<i>No</i>	36%

Seniors – Technology Profile

- Three-quarters (76%) express comfort toward technology usage
- While basic access and communications are reaching ubiquity...
- Infrastructure for remote monitoring and control are present in only a minority of households

All Seniors - Technology Profile	
Category	Percent
Please use the five-point scale below to rank your overall comfort with technology usage such as computers, Internet, software applications, smart phones, etc	
<i>Not comfortable at all</i>	2%
<i>Somewhat comfortable</i>	23%
<i>Comfortable</i>	32%
<i>Very comfortable</i>	31%
<i>Extremely comfortable</i>	13%
What kind of digital technology do you have access to and use regularly?	
<i>Desktop or laptop computer, or digital tablet (such as iPad)</i>	98%
<i>Internet</i>	97%
<i>Cellular phone</i>	81%
<i>Online banking</i>	71%
<i>Social Media, e.g. Facebook, Twitter, texting</i>	45%
<i>TV recording, e.g. Tivo or cable box recording device</i>	44%
<i>Webcam, e.g. internet digital video camera</i>	21%
<i>Movies played through the Internet</i>	19%
<i>iPod or other music device</i>	17%
<i>Smartphone, e.g. iPhone, Android, Blackberry</i>	15%
<i>Remote-control room temperature, e.g. remote-control thermostat for heating or air conditioning</i>	12%
<i>Remote-control house lights</i>	6%

Caregivers – Basic Demographic Profile

- Typical ages are consistent with Adult Child as Caregiver scenario

- Very clear opportunity/requirement in ensure proper Caregiver education or training

Caregivers - Basic Demographic Profile	
Category	Percent
What is your age?	
<i>18-24</i>	0%
<i>25-39</i>	4%
<i>40-54</i>	36%
<i>55-64</i>	46%
<i>65-74</i>	12%
<i>75-85</i>	1%
Please indicate your gender?	
<i>Male</i>	39%
<i>Female</i>	61%
Do you have any professional training or certifications for providing care to a senior?	
<i>Yes</i>	18%
<i>No</i>	82%

Caregivers – Role & Relationship Profile

- Roughly half the survey sample were actual Caregivers, and half were Influencers who do not directly deliver care
- Adult children are most likely to provide Senior care

Caregivers - Role & Relationship Profile	
Category	Percent
Which of the following best describe what you do for the senior?	
<i>I am a full-time caregiver for the senior, e.g., provide regular assistance with activities of daily living, transportation, medical decisions, etc. (CAREGIVER)</i>	12%
<i>I am a part-time caregiver – as needed – and assist with the activities of daily living, transportation, meals, etc. (Caregiver)</i>	8%
<i>I am not a day-to-day caregiver, but I help the senior make decisions that affect his/her living arrangements, health and well-being, finances and security (INFLUENCER)</i>	54%
<i>I am both a caregiver and I help the senior make decisions that affect his/her living arrangements, health, finances and security (BOTH)</i>	26%
What is your relationship to the senior?	
<i>I am the spouse or 'significant other' of the senior</i>	12%
<i>I am an adult child of the senior</i>	69%
<i>I am a professional caregiver not related to the senior</i>	1%
<i>I am a friend of the senior</i>	3%
<i>I am a relative of the senior (other than spouse or adult child)</i>	14%
<i>Other</i>	2%

Caregivers – Other Profiles

- Given the importance of diet and exercise on maintaining overall health, enabling greater influence by Caregivers in these areas could be a win-win opportunity

Caregiver Profile - Technology	
Category	Percent
Which of the following decisions are those in which you have a high level of input and influence?	
<i>The senior's medical decisions, e.g., when to go to the doctor</i>	67%
<i>The senior's living arrangements, e.g., whether they live at home or independent living facility</i>	64%
<i>Financial investments</i>	57%
<i>Large purchases, e.g., car, vacation, furniture, etc.</i>	56%
<i>Diet</i>	40%
<i>Exercise</i>	27%

- Caregivers are more comfortable with technology than the Seniors they support
- This is consistent with basic age-related technology adoption patterns

Caregiver Profile - Technology	
Category	Percent
Please rank your overall comfort with technology usage, such as computers, internet, software applications, smart phones, etc.	
<i>Comfortable at all</i>	10%
<i>Somewhat comfortable</i>	19%
<i>Comfortable</i>	16%
<i>Very comfortable</i>	25%
<i>Extremely comfortable</i>	31%

Next Step Programs Offered

- RASI for Your Organization
 - Deeper analysis in areas of interest to your organization
 - Other data cuts, segmentation if desired
 - Presentation of results at your organization
 - Development of a full ideation portfolio specific to your organization
- Innovation Sessions, Training & Facilitator training
 - Generate disruptive and breakthrough solutions either through new solutions or by identifying initiatives in your pipeline that will create great value.
 - Create shared value through your existing products and services; show society how you participate in and preserve society and the environment
 - Innovate new business models
 - Discover diffusion strategies for your programs

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