Seniors at Home
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Major Demographic Shift

90% of respondents age 65 years and older say they prefer to stay in their home. In the last 30 years, the average age of a nursing home entrant has gone from 74 to 90. The result is 40 million+ older adults age 65 and over living alone in U.S., Canada and Europe.
The Aging-in-Place Challenge

- Healthcare (emergency, chronic, preventative)
- Mental health and loneliness
- Home care services
Consumer Perspective

On Assisted Living

“I can’t see assisted living. That’s the night of the living dead right there as far as I’m concerned”

–Brent, 71

On Privacy and Intrusiveness

“Even if we might think it’s intrusive, the reality is that if you died in the night and someone didn’t make that intrusive call, you could lay there 30 days and rot before somebody got to you. So even if it’s intrusive, we have to decide which is the best. A little intrusiveness, or someone to really check on us.”

–Glenda, 70

On Design Flaws

“The people who design houses and apartments and even senior living facilities should be sentenced to have to support an older person or talk to older people about what their needs are”

–Jeff, 70

On Aging Needs

“As we get older, and less able to handle the physical responsibility of taking care of a home with a lot of maintenance requirements, it’s going to come at some point where we have to downsize, resize, recalibrate what we’re doing”

–Jeff, 70

On Solution Cost

“We’ve discussed it [Fitbit], until we started talking price. She was like; you’re going to pay $160 bucks for that? No, I don’t want it.”

–Greg, 55
Market Opportunity

Baby Boomers (born in late 1940s and 1950s) have more than 70% of U.S. financial assets and represent over 50% of all discretionary spending.
Fragmented Industry
Case Study - Lively™

Personal Emergency Response — Reimagined

Say “good-bye” to compromise

Watch face only 1.97" diagonal

One-push Help Button
Waterproof Safety Watch
Medication Reminders
Daily Activity Sharing
Step Counting
Family Alerts

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Seniors@Home Landscape: Technology Evolution

1.0 Near Term
- In market or announced

2.0 Mid Term
- Technology exists
- Market opportunity

3.0 Long Term
- Technology is TBD
Healthcare (emergency, chronic, preventative)

1.0 Near Term
- Patient Monitoring (Preventice)
- Wearable Sensors (Fitbit, Metria)
- Emergency Response Systems (Lively, Great Call, Beclose)
- Telemonitoring
- Prescription dispensing

2.0 Mid Term
- Digital Diagnostics (Neurotrack)
- Digital Therapy (Wellframe)
- Smart pill
- Rehabilitation gamification
- Predictive analytics (i.e. 80% probability of fall)
- Ambient monitoring (TV, appliances, living space, bed)

3.0 Long term
- Digestible sensors
- Personalized medicine
- Anti-Aging Technologies
- Prescriptive Analytics
- Auto drug delivery through wearable skin patch
- Artificial pancreas
- Whole body immersive experience
Mental Health

1.0 Near Term
- Lumosity
- Carebots with Samsung tablets and sensors

2.0 Mid Term
- Tele-presence
- Personal assistant bots

3.0 Long term
- AI dialogues (humanoid)
- Companion robotics
- Personal assistant
Home care services

1.0 Near Term
- Fitbit
- Voice interface enabled services
- Conversational UI
- Home care service marketplace Carelinx

2.0 Mid Term
- AI Q&A (avatar)
- Self-learning remote care platform

3.0 Long term
- “Butler bots”
Conclusion

• The overall landscape is ripe for disruption and consolidation - incumbents are poorly positioned to solve the overwhelming needs

• As technology evolves, disruptive changes shall occur in the three areas needed to keep seniors in their homes, centering on care: physical, mental, and day-day