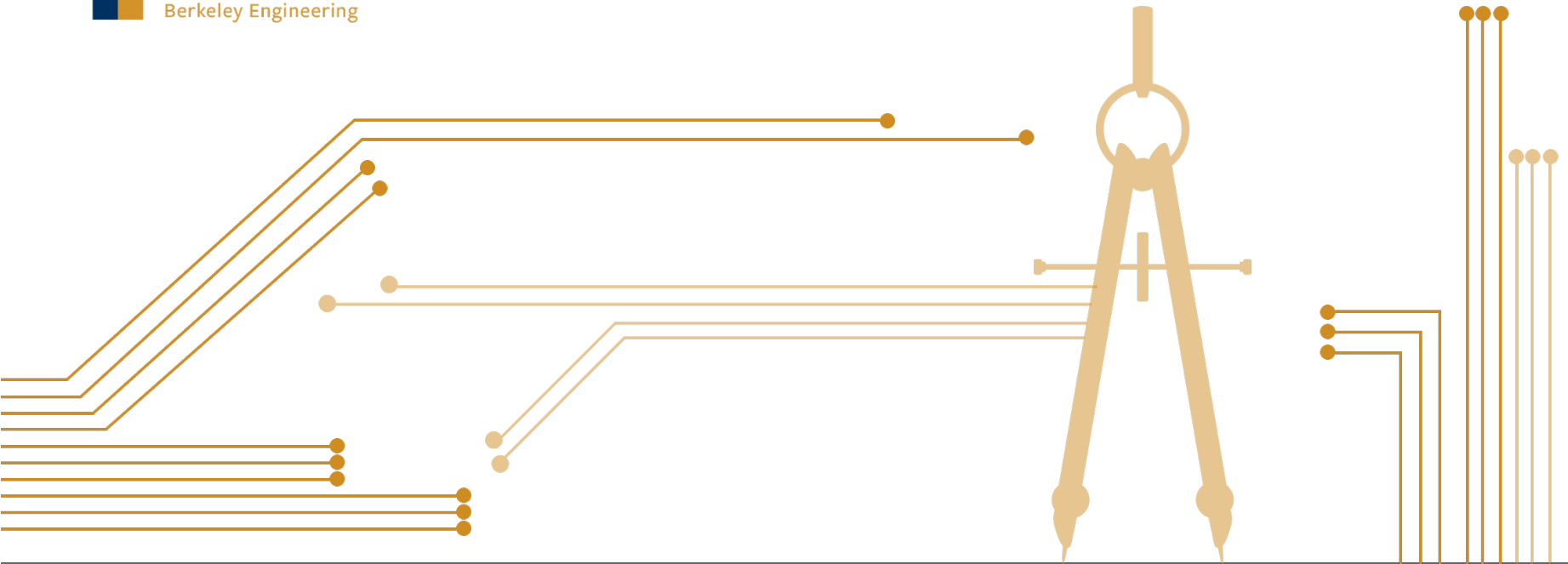




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Dependent Care 2.0

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Caregiving in new era

- Age in residence
- Diverse need for everyday relief
- \$72.3B market in 2020
 - 80% expense out-of-pocket
- Tech to bridge gap between seniors and caregiver



117M

Americans are expected to need assistance of some kind by 2020



FORECAST:

45M
UNPAID
CAREGIVERS

5M
PAID
CAREGIVERS

Caregiving Innovation Frontiers |

Opportunity (2020 est)

- 13% CAGR from 2016 to 2020

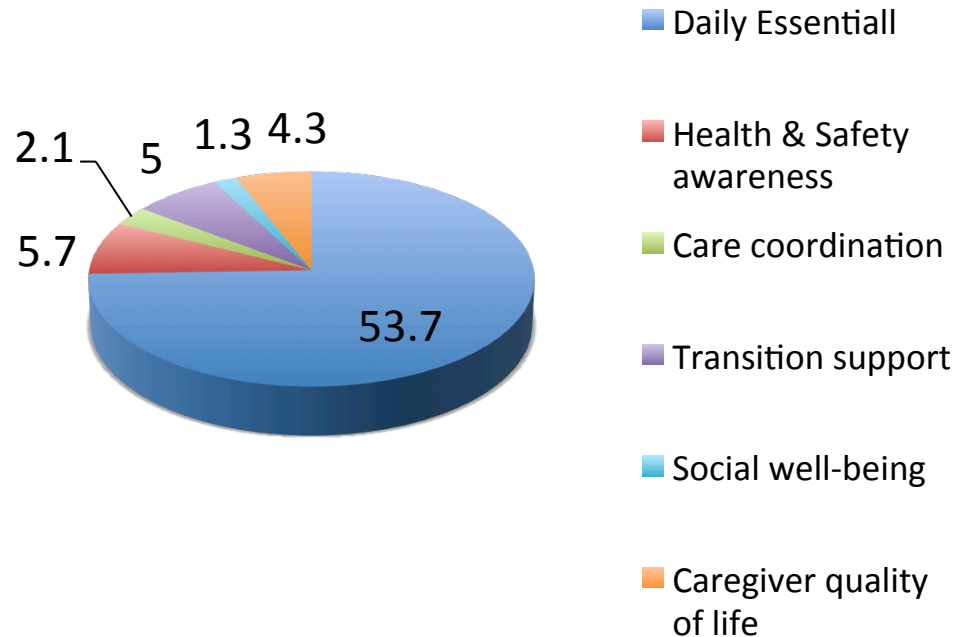
- 42B in 2016
- \$279B cumulative market
- Amazon, Uber, and more more

- Growth fueled by disruption

- Six Major areas

- Daily Essential
- Health & Safety awareness

2020 Market size



Marketplace

Marketplace Landscape

Company	Investment/Market Cap	IPO/Private
Care.com	\$260M (Market Cap)	IPO (Google investment)
ClearCare	\$75.6M (4 rounds)	Private
Honor	\$62M (2 rounds)	Private (Andressen Horowitz)
HomeTeam	\$43.5M	Private (Kaiser Permanente)
HomeHero	\$23M (3 rounds)	Private

Online Marketplace Automation

- Optimize middleman cost
 - Better pay/benefit and more flexibility to caregiver
- Improved service quality control
 - Feedback and rating
 - Online training
 - Online service notes and records

Opportunities

- Marketplace efficiency leads to
 - Market-driven pricing
 - More service options - e.g., 1 hour per day
 - Better caregivers
 - Quick backfill for sick caregivers
 - Increased adoption to the services

Challenges

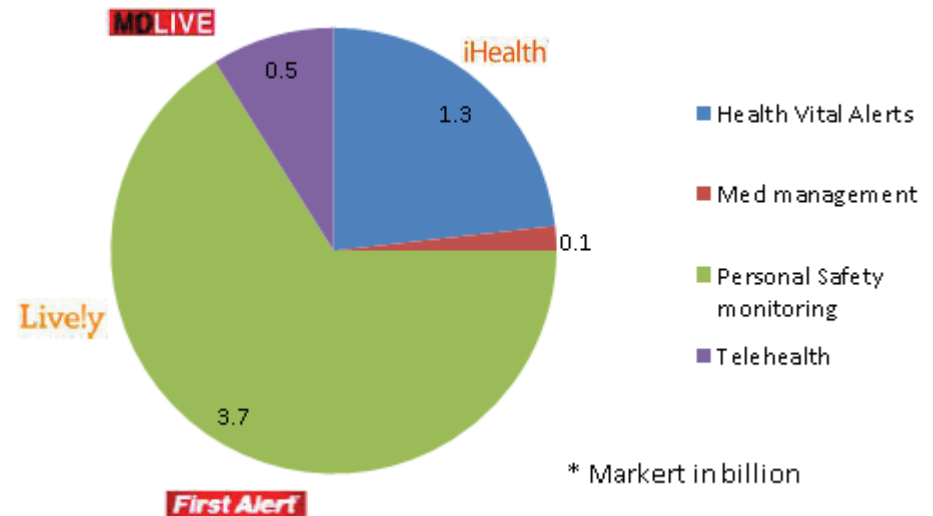
- Increase awareness and adoption rate
- Control service quality and brand reputation
- Retain users for recurring business
- Limit labor and legal risks

Service and Gadget (Health & Safety Awareness)

Health & Safety Awareness



“It was always a challenge to stay ahead of someone with dementia because, just as I thought I had things figured out, Granny would be one step ahead of me with something else.”



MARKET REVENUE FORECASTS 2016-2020

Total market revenue includes out-of-pocket spending from both care recipients and caregivers, as well as reimbursements from private and public insurers and business-to-business spending.

CAREGIVER OUT-OF-POCKET SPENDING

 **\$4.3B**

TOTAL CAREGIVER SUPPORT MARKET

 **\$20.3B**

Health & Safety Landscape

Company	Investment/Market Cap	IPO/Private
Greatcall	\$75M (5 rounds) + 2 acquisitions	Private
MDLive	\$74M (2 rounds)	Private
iHealth	\$25M (1 round)	Private
AiCure	\$12.25M (NIH funded)	Private
Live!y	\$7.4M (2 rounds)	Private

Opportunities

- Solves #1 problem in caregiving - Out of sight is out of mind
 - E.g. 24/7 medical alert system of emergency, medication, and nutrition for older adults
- Improves patient health & less frequent hospital visits
- Health insurance companies investing in medication adherence & telehealth

Challenges

- Expensive solutions
- Old technology & geographically limiting
- Regulatory limitations
- Complex to Install & maintain

Can seniors afford long-term care?

- On average people use 3 years long-term care services, and 20% will need it for longer than 5 years
- Average 65-year-old couple retiring in 2016 need \$130,000 to insure against long-term care expenses, in addition they need an average of \$260,000 (in today's dollars) to cover medical expenses.
- For people in 60-70 age group, median net worth is \$215,000. Only the top 35% people have net worth above \$390,000

How to make long-term care affordable?

- There are 76.4 million baby boomers while only small percentage can afford long-term care
- Most innovations today focus on improving efficiency on existing market
- Much bigger opportunity is to create a different market with much lower cost
 - Fintech innovation to make long-term care insurance more affordable and personal
 - Shared economy for long-term care, different way to leverage senior's asset such as real estate
 - Plug healthy seniors into long-term care market through shared economy

Backup

HEALTH AND SAFETY AWARENESS

- Categories:

Nutrition, Safety, Alerts, Telehealth, Medication Management,
Mobility

- Market size: 2016-2020 (*questions: total in 5 years?*)

\$4.3B out pocket spending; \$20.3B support market

- Solutions

HEALTH VITAL ALERTS, DIET AND NUTRITION, MEDICATION
MANAGEMENT, PERSONAL SAFETY MONITORING, TELEHEALTH

Revolve Robotics

- 2.1M funding (seed rounds)
- Telepresence.
 - Robotic Tablet stand for the video conference
- Field trial with “Acacia Living” (service provider), paired with Zoom video conferencing tech
- Use cases - education and healthcare





- Lack of medication adherence costs healthcare industry \$350+ billion
- AiCure's solution uses AI to ensure right medicine is taken
- Usecases: Clinical research & population health
- 7 million funding from NIH. 12.5 million additional funding.

Greatcall.c

- \$74M funding
- Fitness tracker (Lively.com)
 - \$49.99 + \$14.99 monthly plan
 - Connected to urgent response agents, family member
 - Fall detection



Health & Safety Awareness

Service	Market size (2016-2020)	Examples
Health Vital Alerts	1.3B	iHealth, Cellscope
Med management	0.1B	AiCure,
Personal Safety monitoring	3.7B	Lively, AiCure
Telehealth	0.5B	Touchcare, Dr on demand



Personal Safety Monitoring + Diet and Nutrition + Medication Management

- Connected home health platform with a medical alert device for older adults
 - 24/7 medical alert system, safety watch and in-home hub & activity

- Found





Personal Safety Monitoring + Diet and
Nutrition + Medication Management

- Target market
 - $3.2B = 2.9B + 110M + 190M$
- Service business module and Pricing
 - Monthly: \$34.95/mo; Annual: 29.95/mo; Two years:
\$27.95/mn
 - Hardware is free



• Revenue (Unknown)

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• Competitors

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