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D2.5 Market and Stakeholder Analysis

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Glossary

Acronym	Meaning
ADL	Activity of Daily Living
AR	Augmented Reality
MCI	Mild Cognitive Impairment

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1. Introduction

The CoME project aims to facilitate the self-management of senior and to promote a healthier life-style. This will operate through a continuous monitoring of senior's ADLs which will enable an adequate and continuous assessment of the senior's health status. This health assessment will allow formal caregivers to provide reliable advice to reduce the MCI's risk factors based on the up to date senior's health status. Although the service mainly focuses on seniors, it also addresses other actors involved in the care process:

- ***Senior.*** Enable self-management, self-monitoring, self-reporting and the development of preventive behaviors through the set-up of daily goals, cognitive exercises, and the use of wearable devices for monitoring ADLs.

- ***Informal caregivers.*** CoME enables informal caregivers to know better current senior’s health status (if allowed by the senior). In addition, the CoME platform will provide a comprehensive and centralized online community of caregivers. Throughout this community, informal caregivers will access useful guidelines on good practice, tutorials and will allow them to share experiences through AR devices. Finally, this platform will allow informal caregivers to contact each other for occasional care tasks through a match-making search engine.

- ***Formal caregivers.*** The platform will provide them with a continuous flow of up-to-date information related to the senior’s health status. After processing this information, the formal caregivers will provide health reports where activities to promote healthier lifestyle and slow down MCI will be gathered.

This analysis aims to assess the market opportunity for the CoME platform. To that end, this market analysis will be structured as follow:

- ***Market overview***. Define the market size and its opportunity for growth.

- ***Target users.*** Identify the target user and determine its relation with the different stakeholders

- ***Competitive environment.*** Identify competitors and explain their strengths and weaknesses.

- ***CoME positioning.*** Ascertain the positioning of the CoME solution in respect with the target user needs and the competitive environment

In previous researches, the general conclusion was that the current market is highly fragmented with dominant designs yet to emerge. For this reason, the present market analysis will not be limited to a static analysis of the current players and will also take into account the various constraints and success factors which will shape the dominant design of tomorrow.

2. Market Overview

In order to understand the **domiciliary care service** market, it is worth looking first at the overall picture of the healthcare industry together with some key demographic figures which will influence the direction where the industry is moving. Once the general trends of the healthcare industry assessed, we will turn to the particularity of the **digital domiciliary care service** market. At this stage, the primary focus of the analysis is to delimit the size and scope of this specific market and assess its potential for growth. This chapter will enable us to understand better the market dynamics which are surrounding the target customer who will be the subject of the following chapter.

2.1. Healthcare sector and demographic figures

According to the Jun 2016 study published by the Economist Intelligent Unit, the Global health care expenditure should reach 8.67 trillion by 2020, from 7 trillion in 2015. This increase is driven by improving treatments in therapeutic areas coupled with rising labor costs and increased life expectancy. In 2017, the health care spending as a percentage of the gross domestic product (GDP) is estimated to be of 10.5% in West Europe and to a staggering 16.7% in North America. These figures demonstrate the **growing size of the healthcare industry** and also show the impact of the healthcare cost to the overall economy and pinpoint the **need for cost-effective solutions** in the sector which could ideally be developed throughout a more patient-centric business models and thus **favorizing the rise of the digital domicile care market**.

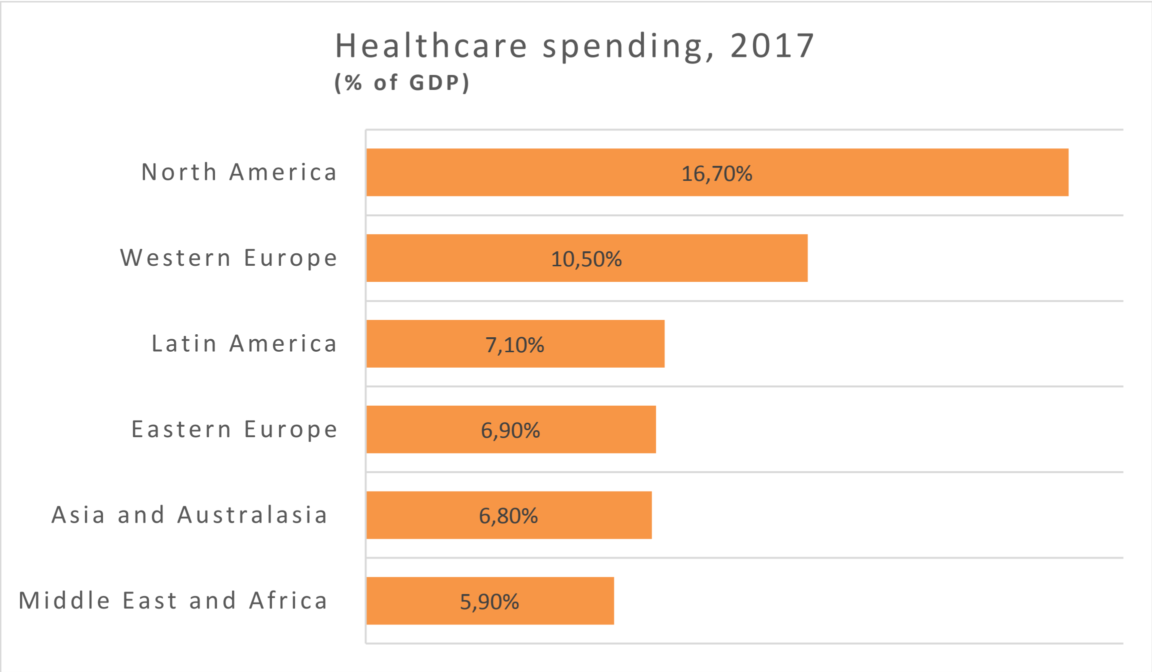

Figure 1 Healthcare spending, 2017

Source: The Economist Intelligence Unit

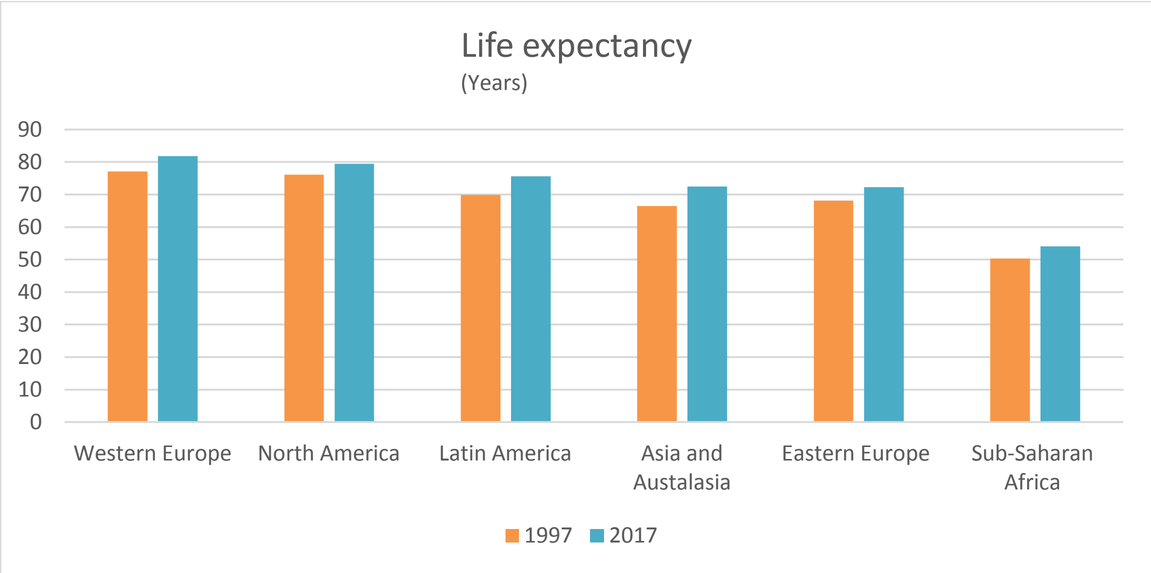

Figure 2 Life expectancy

Source: The Economist Intelligence Unit

2.2. The digital domiciliary care services market

After this brief overview of the healthcare market which pinpoints the rise of the digital domiciliary care services market, we will turn to the specific related to digital market itself. To that aim, we will ground our analysis on the Deloitte's 2016 Consumer Priorities in Health Care Survey(1) that provides a useful set of data which would enable us to better define the market opportunity for the CoME platform.

The Survey shows that though growing within the population, the use of digital technology is still lagging behind other uses (Figure 3). This suggests that the full potential of the market is yet to come as the diffusion of the digital care services technology may not have reached its tipping point. Nevertheless, the consumer has an appetite for using technology-enabled care. Deloitte noticed that seven in ten consumers are likely to use such a technology. By contrast, the older generation namely the Baby Boomer and the Senior are more interested in remote patient monitoring (Figure 4). These figures demonstrate the existence of a trend toward a greater engagement of Senior and Baby Boomer health consumers in a more patient-centric health care model and an increasing self-involvement in prevention against age-related illness and degeneration.

More than solely recognizing the demand for a digital domiciliary care services, the survey identifies the key population which will influence the diffusion of these technologies. Although seniors in risk of diseases because of ageing are the most interested in using technology-enable care and represent a key demographic to be targeted, i caregivers as well as healthcare companies and insurance companies play a nodal role in the diffusion of the technology use through persuasion within their network of peers and should thus be one of the primary focus in the launch of new digital care services. The importance of the latter mentioned are then further explained in section 3.2.2 and 3.2.3.

The demand from an increasingly engaged and empowered healthcare consumer for services and solutions which are coordinated, convenient, customized, and accessible is an emerging trend, as demonstrated by the Deloitte's survey. In that light, a platform that supports self-management, the promotion of a healthy lifestyle and which finally enhance the communication between stakeholders thank to an online community network coupled with a matchmaking engine such as CoME follows the growing sector trend and shows a significant market potential.

Please find below the transcript of the graphics included in the 2016 Deloitte's survey of US Healthcare Consumers.

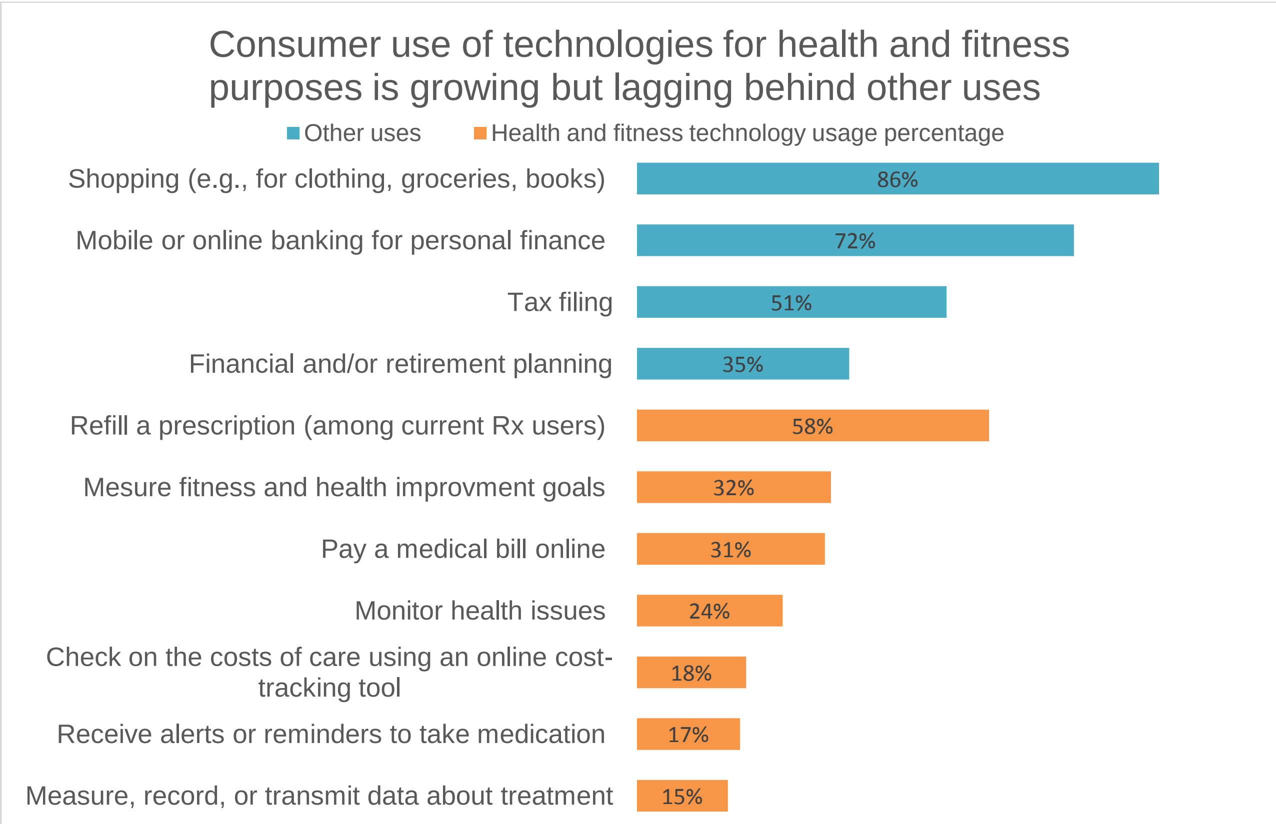

Figure 3 Consumer use of technologies for health and fitness purposes is growing but lagging behind other uses

Source: Deloitte 2016 Survey of US Health Care Consumers

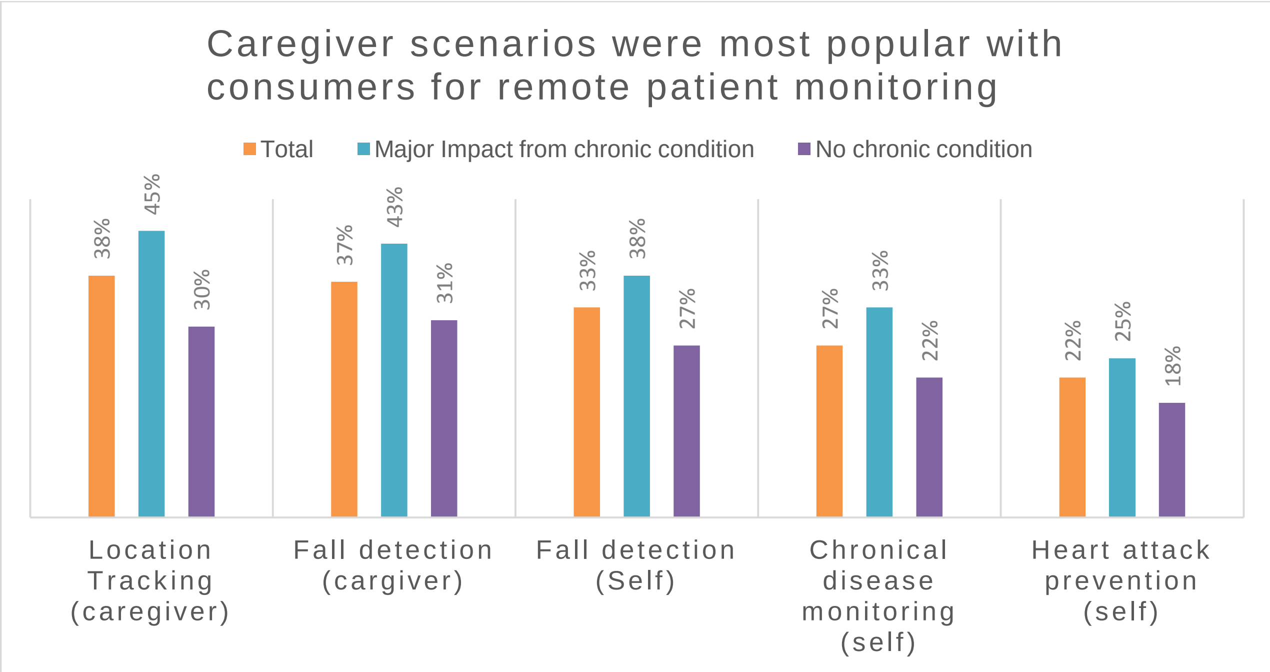

Figure 4 Caregiver scenarios were most popular with consumers for remote patient monitoring

Source: Deloitte 2016 Survey of US Health Care Consumers

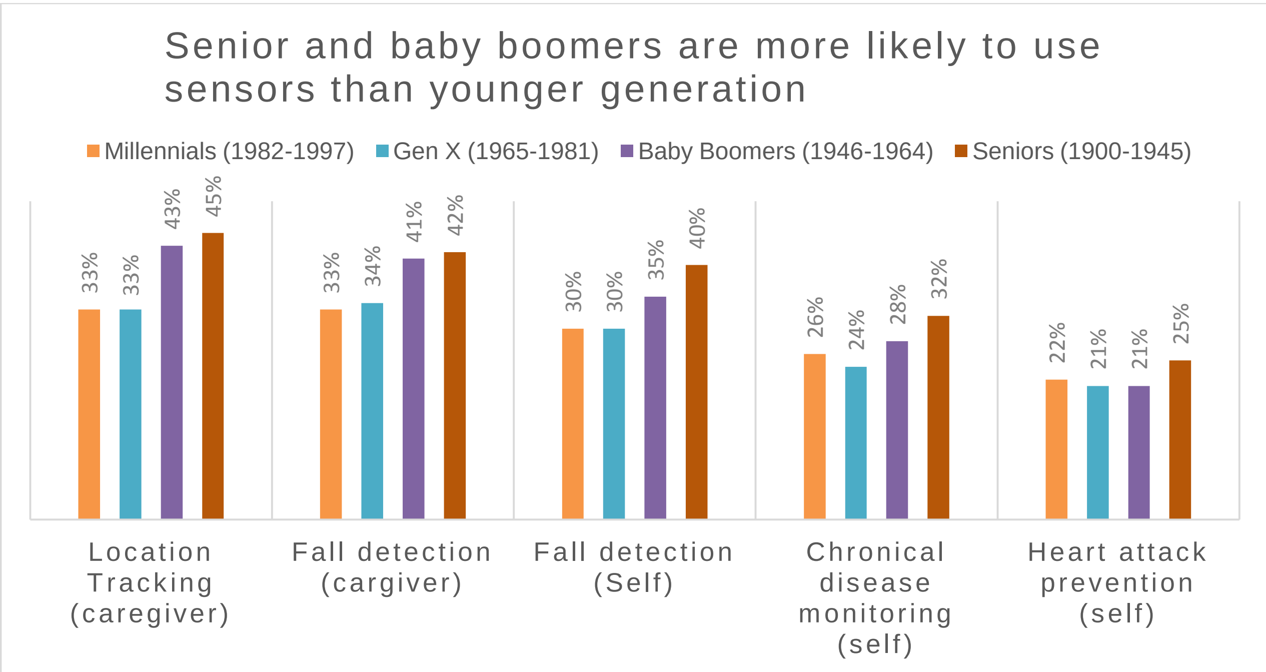

Figure 5 Senior and Baby Boomers are more likely to use sensors than younger generation

Source: Deloitte 2016 Survey of US Health Care Consumers

3. Target users

After a brief overview of the overall market for digital domiciliary care services, we will present and define the target user for CoME platform. This will set the limits of our analysis. Once the target user is explicitly defined, we will turn to the specificity of the targeted segments, in particular regarding the access and use of smartphone and tablets.

3.1. Targeted Segments

The CoME platform has a preventive purpose and aims to limit the physical and mental degradation related to the aging process through the promotion of a healthy lifestyle, with the development of a self-assessment system. By doing so, the CoME platform should help prolong or maintain the user below the assisted living limit.

The **target user for the CoME** platform is defined as an old adult **either a Senior** (1900-1945) or the first tranche of the **Baby Boomer segment** (1946-1964). As such, the target user is not necessarily a senior in need of care (like seniors with Mild Cognitive Impairment - hereafter “MCI”) but also encompasses older adults who want to lead a healthier lifestyle and minimize their risks for developing of MCI. Besides the senior user, the family and informal caregivers surrounding the seniors should also be considered as key influencers in the purchase decision. They can even be the main trigger in the decision or be themselves the buyers. In addition to these, the scenario of institutional recommendation also needs to be tackled: **insurance companies, health organisations, medical networks,** etc can take up these solutions and decide to deploy them throughout their customer / patient base in order to deliver healthcare services in a more efficient and cost-effective way. Both informal caregivers as well as insurance companies and health organisations are quite important because, apart from clients they are important distribution channels in the process of carrying CoME to seniors.

3.2. Trends and market size for CoME

As the targeted segments have been determined, we can now turn to the particularity of these demographic segments, i.e. seniors, informal caregivers and healthcare institutions and insurance companies.

Due to CoME will be driven to the whole European population, data from Europe have been considered in this market analysis.

3.2.1. Market size for Seniors

As mentioned in section 3.1, for seniors we will focus on seniors over 55 years old, Baby Boomer segment, that are apparently healthy and are worried to keep or maintain their current health status. Based on this, we can determine that the market size of seniors for CoME will be mainly driven by factors such as: the level of digitalization, i.e. the level of penetration of smartphone/tablets as well as the internet usage, and the self-perceived health status.

3.2.1.1. *Level of digitalization: penetration smartphone and tablets, mobile internet usage*

Tough the seniors have the reputation of being reluctant to the adoption of the technology, recent surveys show a rising demand within this demographic for digital healthcare services – which is even nearly as much as their younger counterparts. They are mainly interested in using tools for better manage of their healthcare (2):

- **Self-care**: More than two-in-three seniors prefer to use self-care technology to independently manage their health.
- **Wearables**: More than three-in-five seniors are willing to wear a health-monitoring device to track vital signs, such as heart rate and blood pressure
- **Online Communities:** Three-in-five seniors are somewhat or very likely to turn to online communities.
- **Navigating Healthcare**: A third of seniors would prefer to work with a patient navigator to manage their healthcare.

However, despite their will to use technology, the level of digitalization they have is a barrier that slows down the adoption of these healthcare tools. According to (3), **32% of the individuals aged 55 years and older use mobile devices** such as smartphones or tablets to connect the internet on the move so we need to take into account that users below this percentage cannot be users of CoME.

3.2.1.2. *Self-Perceived Health Status in older adults*

Self-perceived health is a widely used indicator for health. It deals with the subjective assessment that a senior makes about his/her own health state and serves as an independent predictor for morbidity, health services use and mortality and is often used as an indicator to compute healthy life expectancy.

According to (4), in the EU-28, **44.7% of the people aged 55 and older had in 2015 a good self-perceived health status.** This constitutes one of the trends that could encourage seniors to use CoME, because of the need that they have to keep or improve their current health status as well as reduce the risk of MCI.

Note that seniors with very good self-perceived health status have not been taken into account. This is because the state of plenitude they face, avoid that they take care of their health status and even under the prevention frame, it is difficult to change their mind.

3.2.1.3. *Total Market Size for Seniors*

As the main aim of CoME is to offer a self-management, self-monitoring and self-reporting tool that allows seniors to adopt a healthier lifestyle through the adoption of preventive behaviors, seniors with good self-perceived status are our specific group within the broad older adults group.

However, we need to take into account the level of digitalization of this audience, because this is a barrier that prevents them for using CoME. Based on (5), clear differences appear when looking at the relationship between self-perceived health and educational attainment level in a way that higher educated people perceive their health as better. Taking into account that 68% of the people having completed lower secondary education and over have a set of digital skills that enable them to use CoME, we can determine that the market size of CoME will be 31% of the European population aged 55 years and over, i.e. **51 million of users** according to (6).

3.2.2. Market size for Informal Caregivers

The burden of caregiving for older people is quickly increasing around Europe as the European population ages and confronts age-related health conditions such as chronic diseases as well as declining cognitive acuity and mental health.

Current dynamics between caregiving and existing health systems demonstrate that there is currently a difficulty and lack of preparedness for informal caregivers to detect and respond effectively to health conditions derived from ageing population. This situation generates feelings of guilt, resentment and hostility in informal caregivers that, despite the personal sacrifices they perform, think that they are not doing enough. The above feeling combined with other factors such as work, family, etc. can be quite overwhelming for informal caregivers.

Due to CoME owns all the functionalities demanded by informal caregivers, i.e. comprehensive and centralized online community of caregivers where sharing guidelines and experiences as well as contact with occasional informal and a way to follow better current senior's health status, the market size of CoME will cover the broad segment of European informal caregivers, i.e. 51% (7)of the population aged 50 and older[1], 82 million people could be users of CoME.

3.2.3. Market Size for Insurance Companies and Organizations

High health care expenditures is making that healthcare organizations around the world are experimenting with new approaches to managing costs without detriment of patients' health. Under this framework, digital health care tools have been postulated as solutions to reduce costs and prompt widespread innovation in the healthcare delivery, promoting disease prevention and reducing the number of hospital admissions. Their potential advantages are clear: they offer better services to a larger community; leverage the advanced tracking and processing technology and devices already available and allow several parties to collaborate and provide integrated care by sharing senior's data to all parties involved in the care process.

However, the implementation of these tools is sometimes limited for the low level of digitalization in insurance and healthcare companies. Although they have been slow to adopt digital channel for health prevention and care, over the next few years, 79% of current healthcare organizations and insurance companies, will grow in digital usage to become the dominant channel to interact with patients/customers (8).

Currently, Europe has some 15,000 hospitals(9) and 3,428 insurance companies (10), so around 14,500 healthcare organizations and insurance companies could constitute the market size for CoME.

4. Competitive environment

After analyzing the global customer market and having defined the target customer for the CoME platform, we will turn to the competitive environment by looking at some of the key players in the field. At this stage, it is worth mentioning which approach was used during the screening of the competitive environment.

In our analysis, we take into account the stage of the market for digital care services which is still in an early stage of development with a fragmented competitive scene and no dominant design. We also recognize the characteristics of the CoME platform which aims to be a place where senior could have a range of health-related needs addressed. As such, we consider the different players who have one or more key elements of the CoME's design. The thought behind this approach is that consumers might combine the use of more than one app in their everyday life. In this case, the direct concurrence which CoME might face will lay in this combination of uses of different specific apps. The scope of the analysis was not restricted to apps strictly focusing on the senior market as several apps did not directly target them but nevertheless enjoy great success in this segment of the population and do hold key features similar to the CoME platform.

[1] European population 50 years and older: 164,617,476

For further information related to the features of the CoME project which have been taken into account when screening the market, please find below.

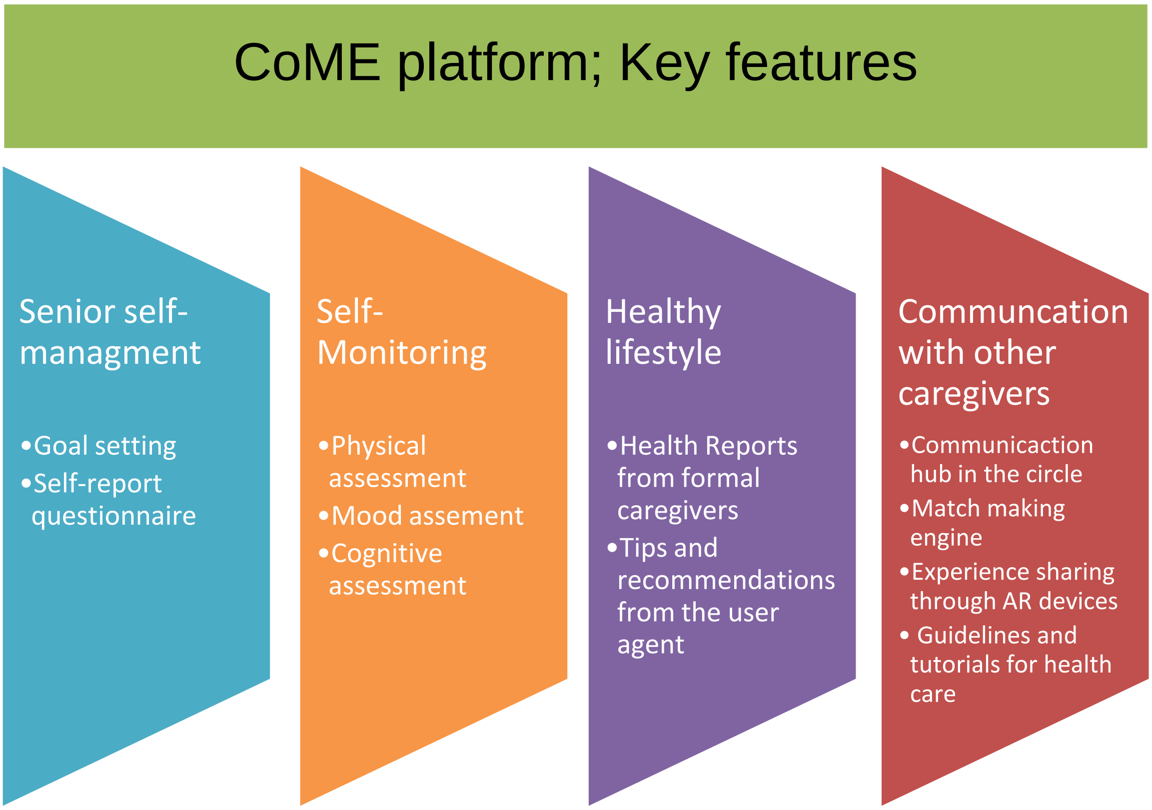

Figure 6 CoME platform key features

Source: Vigisense

4.1. Key Findings

In our research, we selected 13 players who are either advertised or promoted in blogs and websites as particularly useful for our target customers, i.e. Baby Boomers and Seniors, and who provides one or more features of the CoME platform.

In this pool of players, we reviewed three pricing strategies:

- Free apps funded through either advertisement and paid-post, donation/subvention or sale of Hardware;
- Freemium approach meaning: the basic version free and the premium to be paid;
- Commercial app with either a monthly fee or a purchase fee.

As shown in Figure 13, the free pricing strategy is the most commonly used followed by the freemium pricing. Only two of the apps in the select pool where paying app. The overall pricing strategy of the competitor seems to corroborate the finding of the Deloitte's survey which pinpoints the fact that customers were not willing to pay for these apps and consider that this cost should be covered by the healthcare assurance schemes or public funding.

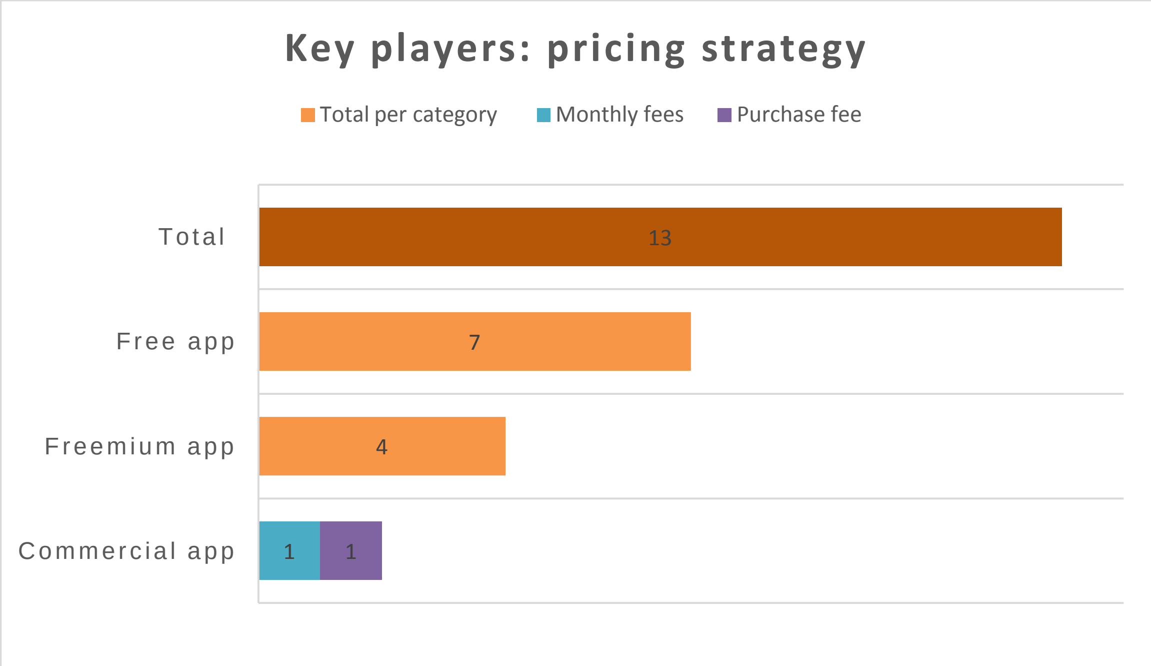

Figure 7 Key players: pricing strategy

Source: Vigisense (cf.: 4.2 List of key players)

Based on our extensive research of the market, we can observe that although the apps studied share some characteristics with the CoME platform, none provides the same mix of features. In this respect, the CoME platform differentiates itself from the rest of its competitors and fills a gap by providing a new answer to the needs of the targeted segment of the population. Indeed, the platform addresses some of the key concerns highlighted in the Deloitte and Accenture surveys. Furthermore, the CoME platform has a holistic approach taking into account the senior together with the needs of the other stakeholders such as the formal and informal caregivers and thus goes beyond the simple lifestyle app cognitive trainer app.

4.2. List of Key Players

1	**CareZone**	
General Information		Main Features
Website	https://carezone.com/home	• Stores a complete list of medication and dosages • To-do list with reminder and tracker of uses of medication as well as medical appointment • Tracks blood glucose, pain, and other important health vitals • Aims to help organize a vast amount of health data • Newsletter related to the relevant family's health issue
Available	IOS/Android	
Pricing	Free	
Customer targeted		
	Person with medical issue and family with person requiring medical care. Do not target specifically the Senior and Baby	

Boomers segment.	• Shares access to important information

Table 1 CareZone

2	Lotsa Helping Hands
General Information	Main Features
Website http://lotsahelpinghands.com/ Available IOS Pricing Free Customer targeted Targeting the Senior and Baby Boomers segment as well as individuals with chronical disease	• Organizes Help through a match-making engine • Enables the creation of an online care community and keep everyone updated

Table 2 Lotsa Helping Hands

3	Ecare21
General Information	Main Features
Website https://ecare21.com/ Available IOS Pricing From 7€ per months up to 180€ Customer targeted The app is clearly targeting the senior segment. The app is advertised for individual as well as health organization.	• Tool for daily care plan activities • Reminder and tracker of uses of medication as well as medical appointment • Monitoring of the activities and vitals (i.e. Glucose, Heart Rate, Physical Activity, Medication Adherence, Weight, Calorie Intake, and Sleep among others) • Creation of a care community • Friendly competition in order to improve stimulate life style improvement.

Table 3 Ecare21

4	Caring Bridge
General Information	Main Features
Website https://www.caringbridge.org/	• Blog platform with collective sharing of

Available	IOS/Android	update simultaneously • Activate your community and coordinate help
Pricing	Free	
Customer targeted	Main target customers are individual with chronical disease or terminal illness. The app is not specifically targeting the senior segment of the market	

Table 4 Caring Bridge

5	Daily Senior Fitness Exercise	
General Information		Main Features
Website	http://www.ebmacs.com//	• Provide a list of daily exercises for each part of the body
Available	Android	
Pricing	Free but financed through ads	
Customer targeted	Baby Boomers and Senior are the prime targeted segments of this app.	

Table 5 Daily Senior Fitness Exercise

6	Senior Fitness Workouts	
General Information		Main Features
Website	http://www.getfitivity.com/	• Workouts at beginner, intermediate, and advanced levels • Instructional coaching using video and voiceover • Animated demonstrations with detailed descriptions and freeze frames • Alternative bodyweight exercises are provided for anything that requires a piece of equipment or machine. • Profile with social notifications, past posts, and your bio • For exercises that use equipment, you
Available	IOS/Android	
Pricing	Freemium approach with premium from 2.5€/month to 6€/month	
Customer targeted	Baby Boomers and Senior are the prime targeted segments of this app.	

	are provided with alternatives that use just the body, not requiring any equipment. • Active community of coaches, elite athletes, beginners, fitness enthusiasts, nutritionists, and athletic trainers

Table 6 Senior Fitness Workouts

7	Healthmapper	
General Information		Main Features
Website	http://www.healthmapperapp.com	• Symptom tracker • Create charts to see which symptoms occur most. Identify the effect a new medication, diet or exercise is having on the symptoms • Document how a condition is progressing with health reports which can be exported • Reminder related to the medication that should be taken
Available	IOS	
Pricing	4.5€	
Customer targeted	Individual with chronical diseases. The app is not target specifically the Senior and Baby Boomer segment of the population	

Table 7 Healthmapper

8	WebMed	
General Information		Main Features
Website	http://www.webmd.com/mobile	• Symptom Checker – Select the part of the body that is troubling you, choose your symptoms, and learn about potential conditions or issues. • Medication Reminders – View daily medication schedules and instructions, pill images with dosage and timing information, and receive reminders for when it's time to take a given medication. • Healthy Target – Create and sustain healthy habits by tracking your progress daily, connecting wearable devices, and getting actionable insights at the end of each week. • Healthy Living – Choose the healthy
Available	IOS/Android	
Pricing	Free finance through advertisement	
Customer targeted	Do not target a specific age segment of the population	

	living interests that matter most to you to customize a daily lifestyle magazine of tips, fun facts, articles, quizzes, and slideshows • Conditions – Find medically reviewed information about conditions relevant to you and learn more about causes, treatments, and related symptoms. • Medicine – Search our extensive database for information on drugs, supplements, and vitamins. • First Aid Essentials – Your handy guide for medical emergencies. • Local Health Listings

Table 8 WebMed

9	Medisafe
General Information	Main Features
Website https://medisafe.com/ Available IOS/Android Pricing Freemium approach with premium from 2.5€/month to 35€/year Customer targeted Individual with chronical diseases. The app is not target specifically the Senior and Baby Boomer segment of the population	• Intuitive visual interface with easy-to-use medication reminder • Track other measurements - such as blood pressure, weight - to make sure you're in great health • View your medication reminder list to see "what's due today?" • Rx refill reminders so you can restock your meds • List PRN medication • Medication progress reports that you can send to a doctor or nurse • Sync reminders with your Android Wear smartwatch • Medication discount card and coupons (US only) at drugstores like Walgreens, Rite-Aid, CVS • New! Now patients using the SureMed pack by Omnicell get a special Medisafe SureMed version for their full medication management experience • Registration (not required) features automatic backup and restore on the Medisafe HIPAA-compliant servers

Table 9 MediSafe

10	Pocket Physio
General Information	Main Features
Website http://www.careukhealthcare.com/pocketphysio Available IOS/Android Pricing Free Customer targeted Clearly targeting the Senior segment of the population	• Provides videos and text instructions on pre- and post-operative physio exercises • Enabling you to establish a strong exercise regime before surgery that you can also continue afterwards • Reminder function

Table 10 Pocket Physio

11	Peak
General Information	Main Features
Website http://www.peak.net/ Available IOS/Android Pricing Freemium with in-app purchase of 1€ which could be cumulated up to 180€ Customer targeted Do not specifically target one segment of the population	• 35 games which aim to challenge memory, attention, problem solving, mental agility, language coordination, creative and emotional control. • Tracking of progress and improvement • Personalized workouts and in-depth insights with the premium app

Table 11 Peak

12	Lumosity
General Information	Main Features
Website https://www.lumosity.com/ Available IOS/Android Pricing Freemium with in-app purchase from 1€ up to 55€	• Daily workouts that draw from 25+ brain games to challenge 5 core cognitive abilities • Workout Modes: carefully curated sets of games that use your training habits and preferences to target different ways

Customer targeted Do not specifically target one segment of the population	to train your brain • Detailed Insights: analysis of your game play that sheds light on your game strengths, weaknesses and cognitive patterns

Table 12 Lumosity

13	Fitbit	
General Information		Main Features
Website	http://help.fitbit.com/	• Wirelessly SYNC your Blaze, Alta, Alta HR, charge 2, flex 2, surge, charge HR, charge, flex, aria, one or zip tracker with your android device. • Track your daily goals and progress over time for steps, distance, calories burned and more • Use GPS to track your runs, walks & hikes • Log activities like yoga and workouts to keep you on track • Log food to see how many calories you consume each day, and manage your weight over time • - compete with friends with daily or weekly challenges and compare stats • All day heart rate tracking with Fitbit surge and charge HR
Available	IOS/Android	
Pricing	App free but purchase of the devise needed	
Customer targeted	Do not specifically target one segment of the population	

Table 13 Fitbit

5. CoME Potential Positioning

Following our mapping of the market for digital domiciliary care services and what we learned from this analysis, we can start exploring the ideal positioning of the CoME platform within this distinct market. To do so, we will examine how the platform addresses the needs of the key stakeholders. At this stage, it is worth reminding that CoME intends not only (I) to provide support for Seniors in good health who aim to improve their lifestyle and inhibit the development of MCI, (II) but also seeks to serve the needs of Seniors that are interested in monitoring and self-managing their health status. In order to respond to that needs, CoME follows a holistic approach which helps the Senior, the community of informal caregivers who are surrounding him and improves the professional caregivers' support.

5.1. Needs of the senior

Regarding the Seniors' needs, CoME positions itself as a global platform with a prominent focus on MCI prevention. In this respect, it differentiates itself from the other competitors who follow a platform strategy such as CareZone and Ecare21. As shown in our list of key players, these competitors' focus is the medication adherence of the Senior and the monitoring of the Senior vital signs. By contrast, the apps which cater for cognitive training and provide physical exercises such as Senior Fitness Workout, Pocket Physio, Peak, and Lumosity do not provide a community dimension.

The existence of a senior's requirement for self-care (two-in-three of the surveyed by Accenture) has been demonstrated. This tends to confirm the existence of a demand for a centralized platform with a focus on the MCI prevention.

5.2. Needs of the informal caregiver

Concerning the need of the informal caregivers who are surrounding the Senior with MCI and physical health issues, the CoME platform will include the current MyGuardian functionalities. These are among others: the configuration of senior's profile, the monitoring of the state of the senior (i.e., activities of daily life, ADL) and the distribution of care tasks between the informal caregivers. In addition to the basic functionality of MyGuardian, CoME will incorporate a platform where useful guidelines and tutorials provided by professional caregivers as well as best practices are included. Finally, a tool which enables the sharing of personal information and a match-making application will be developed to better coordinate the effort of the informal caregiver.

In that regard to the above mention features, the CoME platform do not differentiate itself from the rest of the market's segment which focuses on providing a platform linking informal caregivers and Seniors such as Ecare21 and CareZone. Altogether these characteristics represent the upper standard of the section of the market.

5.3. Needs of healthcare organization and insurance companies

Due to the high expenses in healthcare, mainly because of the resources that healthcare organizations and insurance companies have to manage to ensure a good service delivery, digital tools for healthcare and prevention face an important challenge for these companies as a way to: on the one hand, deliver good services to higher audiences with limited resources and, on the other hand, use the digital channel to provide more integrated care and prevention service in an environment where all actors of the care process have access to senior's information in a synchronized and coordinated way.

5.4. Reinforcement of the formal caregiver role

With its holistic approach, CoME aims to improve the integration of the professional caregiver within its online care community. CoME can provide the following additional features: continuous flow of up-to-date information related to the senior needs and its state of health (ii) periodic reports with tasks to improve or maintain the health status of the senior. By better integrating the formal caregivers to the online care community, CoME follows a trend which has been observed in the market (i.e. Ecare21).

6. Conclusion

Our analysis confirms the relevance of CoME:

- The market for digital domiciliary care services is growing, but has yet to reveal its full potential;
- We confirm the need of the targeted users and the other stakeholders for a platform with a broader approach;
- The market is still fragmented with multiple apps addressing different requirements of the targeted user with no dominant design;
- None of the potential competitors have a global platform which focuses on the prevention of MCI.