



Report- *Wireless eHealth and the Elderly Consumer*

The market for wireless healthcare devices is perceived as being driven by two interlinked requirements; the need to reduce the cost of delivering care and the need to build healthcare IT infrastructure that will cope with the growth in the number of ageing baby boomers who will require care in the near future. Even so, many vendors are struggling to find a route into what should be a potentially large and rapidly growing market for new medical devices and healthcare software.

Resistance to healthcare reforms and the deployment of online patient records, as well as scepticism towards Health 2.0 style services on the part of incumbent healthcare providers, are creating barriers to entry for the developers and suppliers of mobile healthcare devices and associated online services.

This report examines an alternative route into the wireless healthcare market that may offer less resistance and avoid some of the current barriers to entry. By using technology to empower existing, but often overlooked, providers of care it should be possible for wireless ehealth vendors to exploit the growing convergence between professional and consumer electronics in the healthcare space. The target user in this case is the 'alpha mom', a demographic group identified by Constance Van Flandern as technology aware females who have a significant influence over purchasing decisions in households containing children. The alpha mom is also a major provider of healthcare to her children and other members of her household - care that would otherwise have to be provided by a GP.

The alpha mom can also be seen a prototype for another, overlapping, demographic group: the 'alpha daughter'. The alpha daughter is a female who is providing care for her ageing parents. She uses technology to assist her in the role of care provider and if ehealth vendors can define both her role and technology requirements accurately, the alpha daughter will become an important user of medical devices and online healthcare services.

When considering the importance of the alpha daughter to the mobile health market, it is necessary to understand exactly how demographic trends will impact on the healthcare and social care sectors. It is widely accepted that ageing baby boomers will cause capacity shortages in the healthcare sector and force healthcare providers to automate substantial parts of the care delivered to the elderly. However, innovation in the healthcare IT market will be driven by the sharp leading edge of the next wave of baby boomers (the 1947 birth cohort) the members of which will soon be reaching an age at which they need increasing amounts of health and social support.

This report examines the market for online services and mobile devices that can help female members of families care for their parents and children.

The report also extends the concept of the alpha mom to that of the 'alpha daughter' - someone who supports elderly parents - and describes how this consumer group could become an important market for mobile healthcare products and services.

It explains how demographic trends will not only cause this market to grow but also create the conditions which enables a select group of products and services to dominate the mobile health market.

Ageing baby boomers have long been recognised as an important driver within the healthcare IT market. This report takes a more detailed look at exactly how this group of consumers will impact on the healthcare sector.

Also included in this report are examples of online support services that could provide an important market for mobile health devices and services, market projections, analysis of the impact of health reforms on care for the elderly and typical marketing strategies.

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