

# PERENNIALS & connected health:

## Dispelling the myths about ageing and technology

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Ipsos MORI



# TODAY'S PRESENTERS



**FRAN**  
**AYALASOMAYAJULA, HP**

For over 20 years, Fran Ayalasomayajula, executive healthcare strategist and technologist, has been dedicated to serving the interests of populations around the world, in an effort to improve the quality of healthcare, provision access to healthcare, and increase health literacy and patient engagement.

Currently Population Health, Worldwide Healthcare Lead for HP, Inc., Fran directs the organisation in the development of strategies and innovations designed to advance and deliver improved clinical outcomes and better population health. Prior to HP, Fran worked for major healthcare institutions, including WHO, CDC, BMS and UHG. Fran holds degrees in epidemiology, public health, information technology, and certifications in project and clinical trial management.

She is actively involved in community-minded initiatives, such as rare disease patient advocacy, and the application of technology services for the promotion of aging with independence and community connectedness. In 2015, Fran was a contributing writer on the Fact Sheet submitted to the White House Conference on Aging, and in 2017 co-author of the LeadingAge white paper on Social Connectedness and Engagement Technology for Long-Term and Post-Acute Care. Fran is the author of several publications on technology-enabled population health management, including best practices for the successful adoption of virtual reality in the clinical setting.



**REENA**  
**SANGAR, IPSOS**

Reena Sangar is a passionate leader in the field of connected health. Often speaking mainstage on global platforms such as CES, HIMSS, Connected Health conference – Reena heads Ipsos' Global Centre of Expertise in Connected Health and is passionate about developing global data assets which push the connected health field forward.

Reena has directed large strategic studies mapping connected health among payers, healthcare professionals and patients. Most recently, Reena led research amongst key decision makers on digital therapeutics and monetisation of patient-generated health data. Reena has a personal passion for ageing and technology; she has contributed to cross-industry alliances focussed on the "longevity challenge," advised on early-stage technology concepts targeted to this group and conducted numerous studies on user experience and patient journey.

Reena has a Bsc in Psychology from University of Kent, she has worked for the National Health Service (NHS) in the UK as a cognitive behavioural therapist before running a mental health charity for a UK non-profit organization. Reena is a Director for Ipsos MORI.

# WHAT WE WILL COVER TODAY

**To dispel myths about today's ageing society and its use of technology, we will explore:**

- Insights into current perceptions of ageing
- Challenges and opportunities for the healthcare industry
- Examples and case studies demonstrating how connected health is transforming healthcare access and experience for the ageing population



# PERCEPTIONS OF AGEING



# THE POPULATION AGED 60 AND OVER IS SET TO INCREASE AROUND THE WORLD

% aged over 60

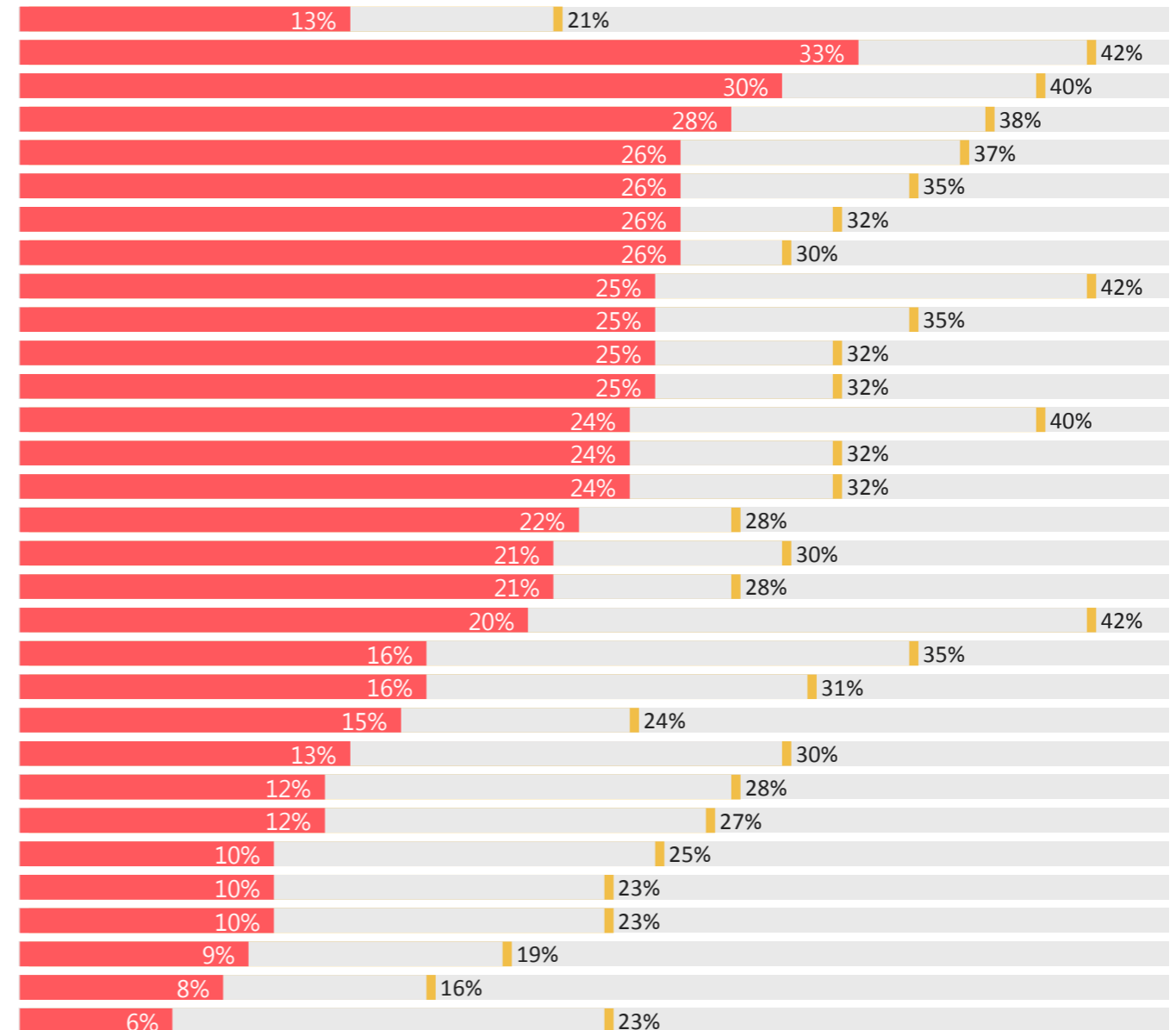
KEY:

2017 2050



## World

Japan  
Italy  
Germany  
Czech Republic  
Hungary  
France  
Sweden  
Spain  
Romania  
Belgium  
Serbia  
Poland  
Canada  
United Kingdom  
United States  
Russia  
Australia  
South Korea  
China  
Chile  
Argentina  
Brazil  
Colombia  
Turkey  
Mexico  
Malaysia  
Peru  
India  
South Africa  
Saudi Arabia



Source: UN World Population ageing report 2017

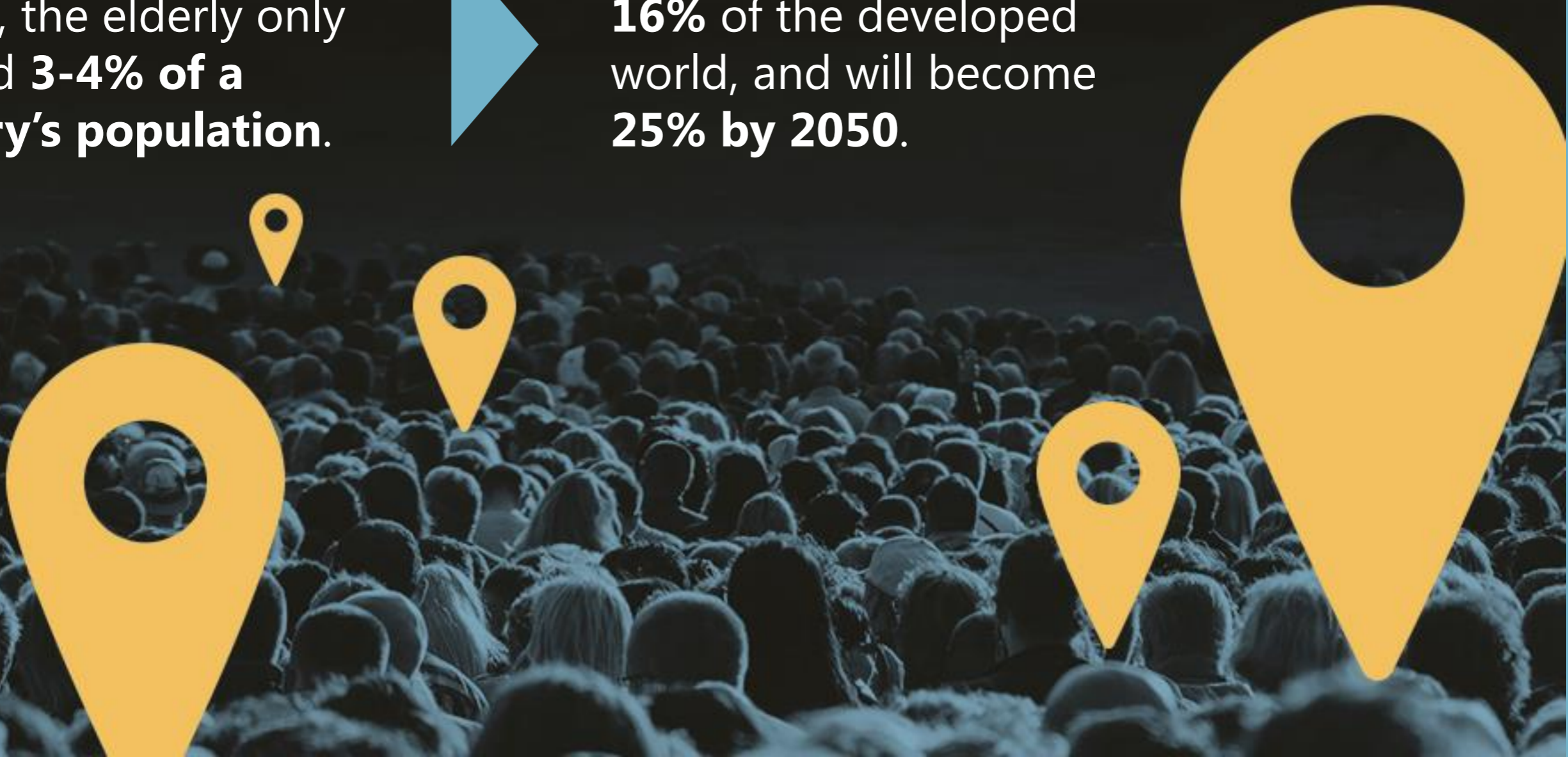
## FROM

Throughout human history, the elderly only totalled **3-4% of a country's population.**



## TO

Today, **seniors constitute 16%** of the developed world, and will become **25% by 2050.**



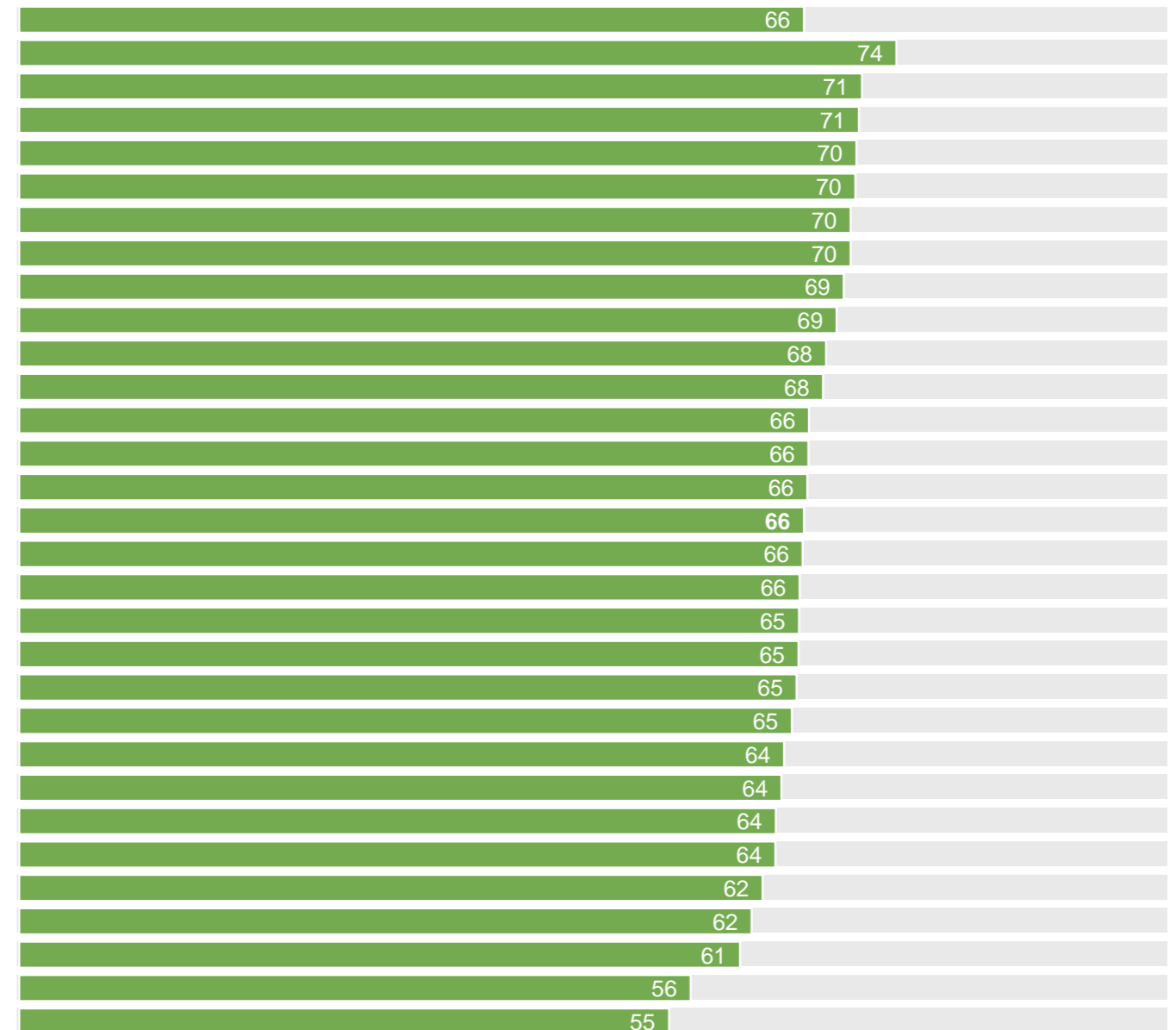
# GLOBALLY, PEOPLE THINK THAT OLD AGE BEGINS AT 66

Thinking about the  
phrase 'old age', at what  
age do you think  
people can be considered  
to be 'old'?

Average guess

## Average

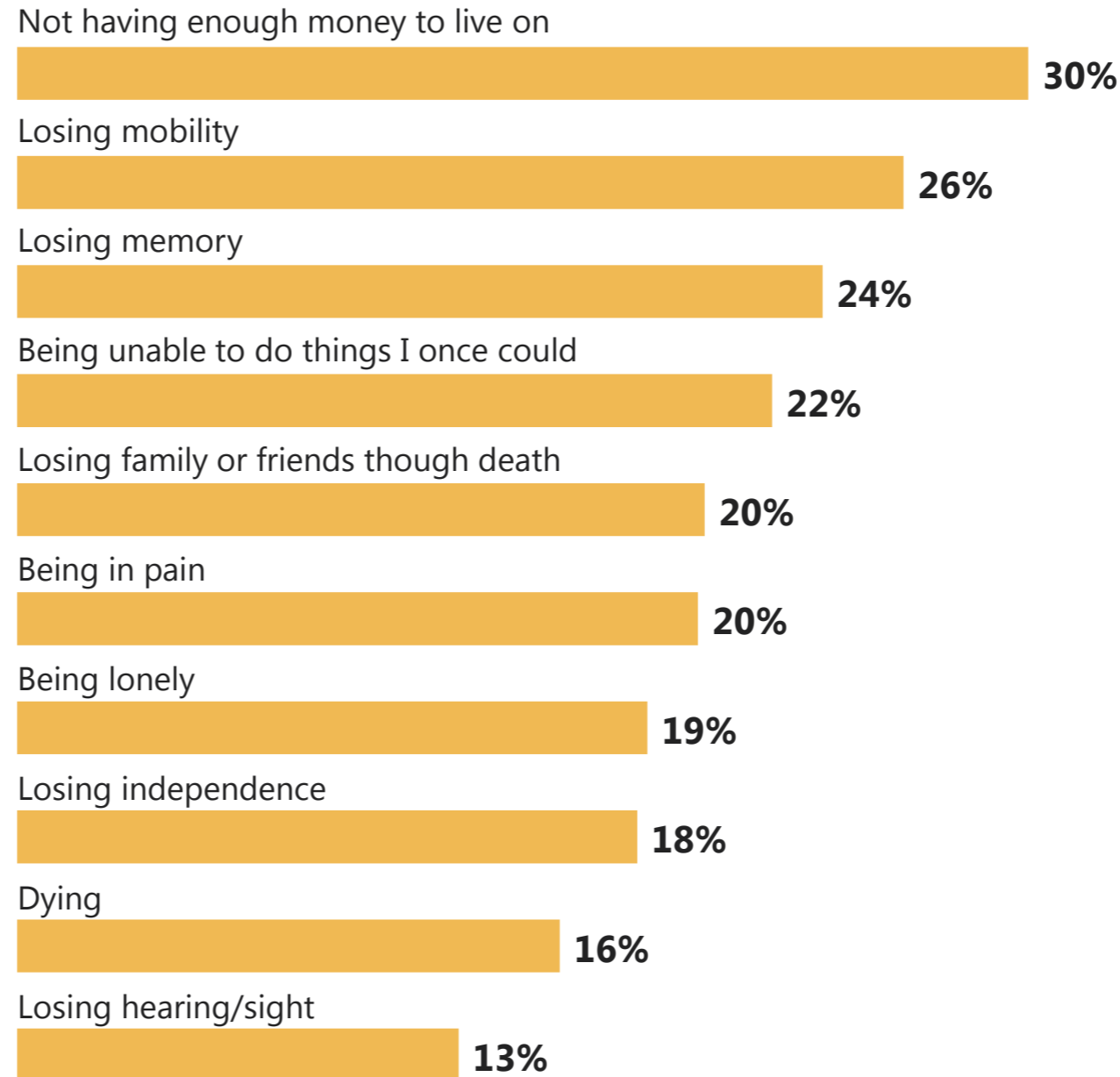
Spain  
Chile  
Colombia  
Argentina  
Belgium  
Italy  
Mexico  
France  
Peru  
South Korea  
Great Britain  
United States  
Canada  
Serbia  
Australia  
Sweden  
Japan  
Czech Republic  
Poland  
Hungary  
Turkey  
South Africa  
Romania  
China  
Brazil  
Germany  
India  
Russia  
Malaysia  
Saudi Arabia



# GETTING OLDER MEANS WORRIES ABOUT MONEY AND HEALTH



**Which two or three things  
personally worry you  
about getting old?**

% mention (Top 10)



# A MAJORITY EXPECT TO BE FIT AND HEALTHY IN OLD AGE

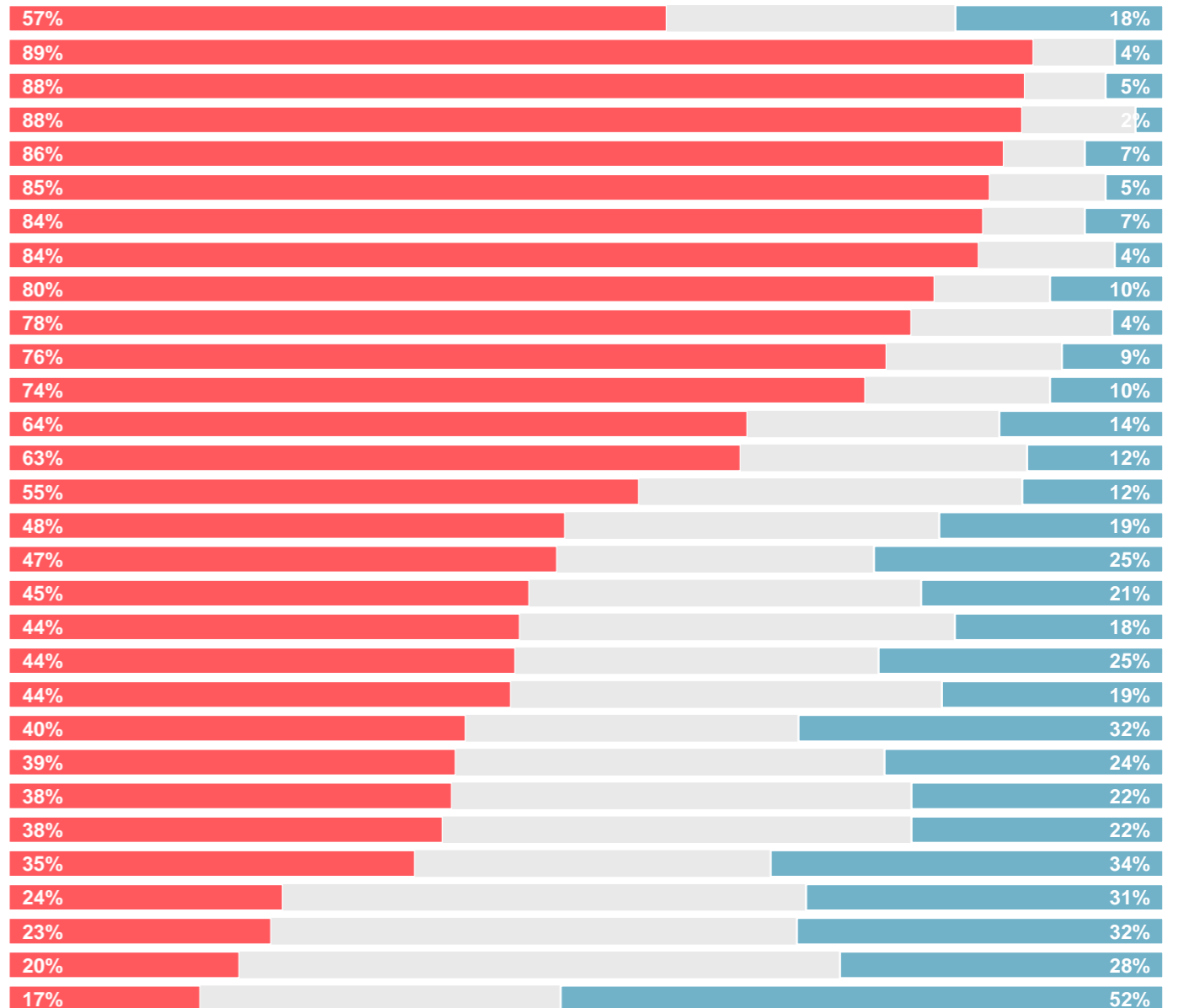
To what extent do you agree or disagree with the following statement? – I expect to be fit and healthy when I grow old.

**KEY:**  
 Agree  
 Disagree



## Average

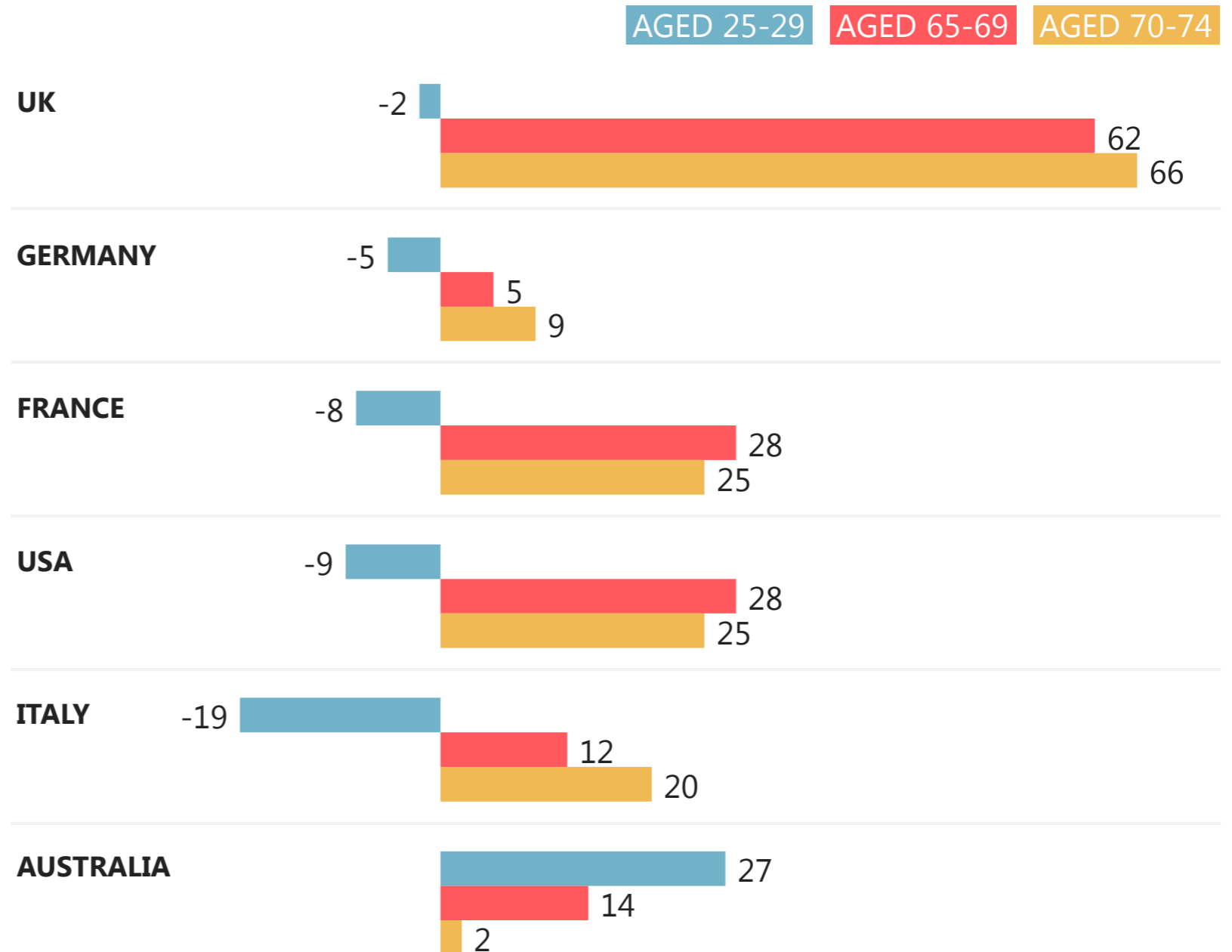
Colombia  
 Argentina  
 China  
 Peru  
 Malaysia  
 Mexico  
 Brazil  
 Chile  
 Spain  
 India  
 Turkey  
 South Africa  
 Poland  
 Italy  
 Saudi Arabia  
 Romania  
 US  
 Germany  
 Sweden  
 Australia  
 Hungary  
 Czech Republic  
 Canada  
 Great Britain  
 Russia  
 Belgium  
 Japan  
 France  
 South Korea



**Base:** 18,262 adults aged 16-64 across 29 countries, online, 24 Aug – 7 Sep 2018 **Source:** Ipsos Global Advisor

# GROWTH IN DISPOSABLE INCOME IS HIGHEST FOR OLDER PEOPLE



Growth in disposable  
income above or below  
national average %  
Source

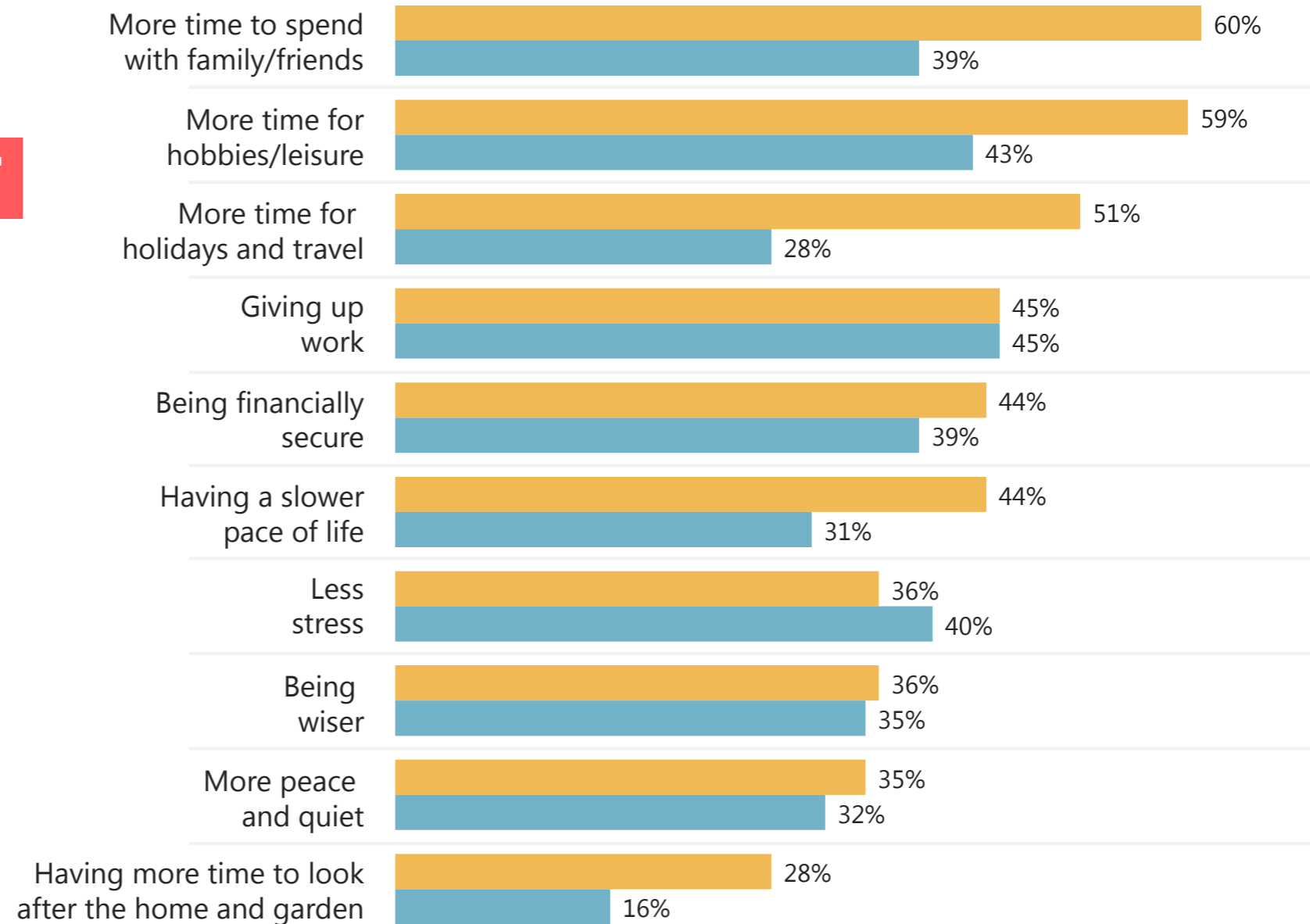


# WHAT SHOULD WE DO TO PREPARE FOR OLD AGE – AND WHAT WE ARE DOING...

Which, if any, of the following do you think is most important for people to do to prepare for old age? And which, if any, of these are you currently doing?

\*Top 10

**KEY:**  
 Prepare  
 Doing



**Base:** 20,788 adults aged 16-64 across 30 countries, online, 24 August – 7 September 2018 **Source:** Ipsos Global Advisor

# SMART HOME ENABLEMENT



**SECURITY**

**FIRE**

**WATER**

**TEMPERATURE**

**PERSONAL  
EMERGENCY  
RESPONSE**

**MONITORING**

**VOICE  
COMMAND  
DEVICES**

**SENSORS**

**GLOBAL  
POSITIONING  
SYSTEMS**



**HP IMMERSIVE EXPERIENCE**

**LAB: 'PROJECT JETTY'**



# OVER HALF AROUND THE WORLD THINK THAT TECHNOLOGY WILL IMPROVE OLD AGE

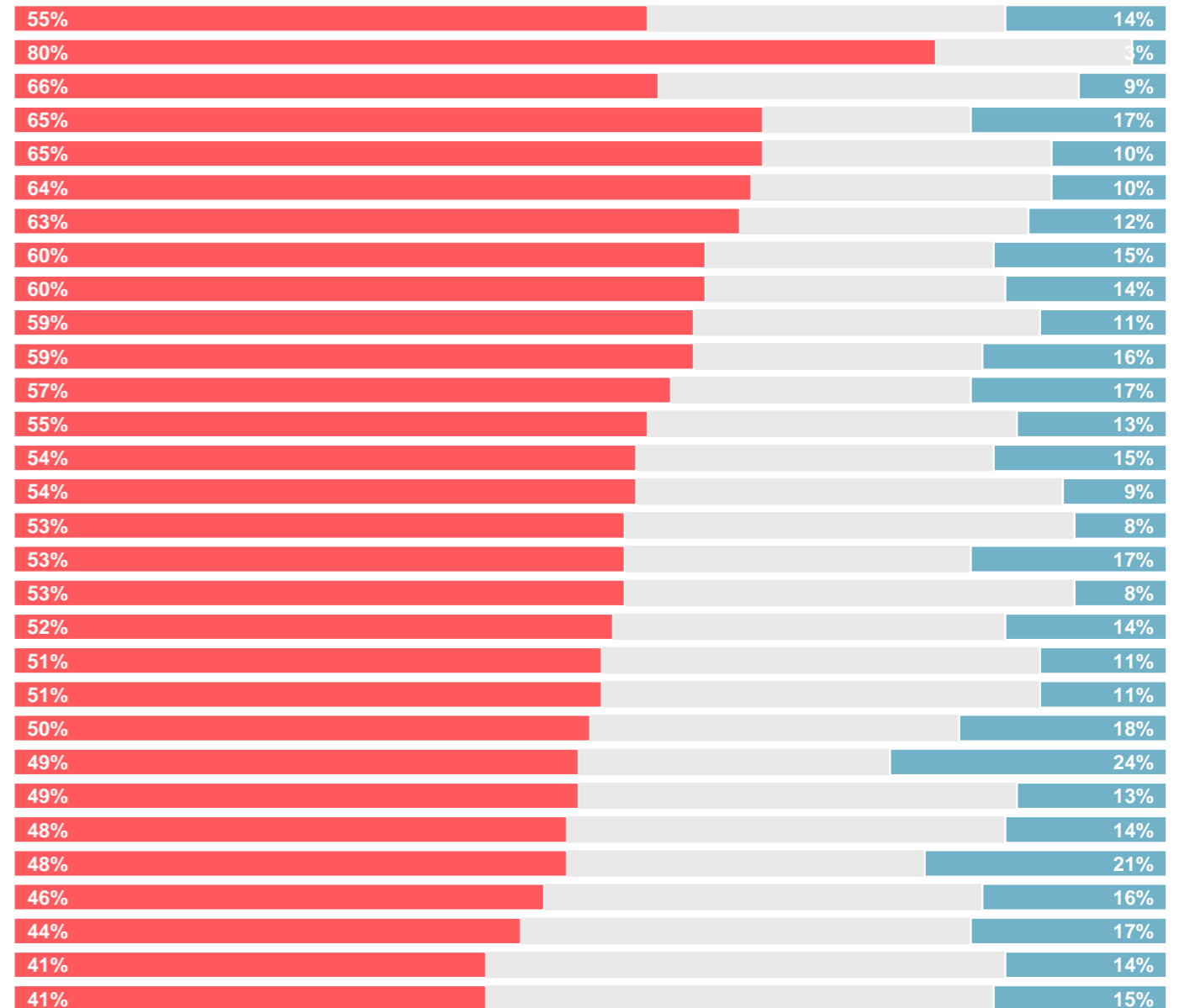
% agree or disagree  
that technological  
developments will  
improve old age for  
a lot of people

**KEY:**  
 Agree  
 Disagree



## Average

China  
Brazil  
Turkey  
Argentina  
Spain  
India  
Malaysia  
Peru  
Italy  
South Africa  
Colombia  
Mexico  
Saudi Arabia  
South Korea  
Australia  
Romania  
United States  
Poland  
Germany  
Great Britain  
Chile  
Russia  
Canada  
Czech Republic  
Hungary  
Sweden  
France  
Belgium  
Japan

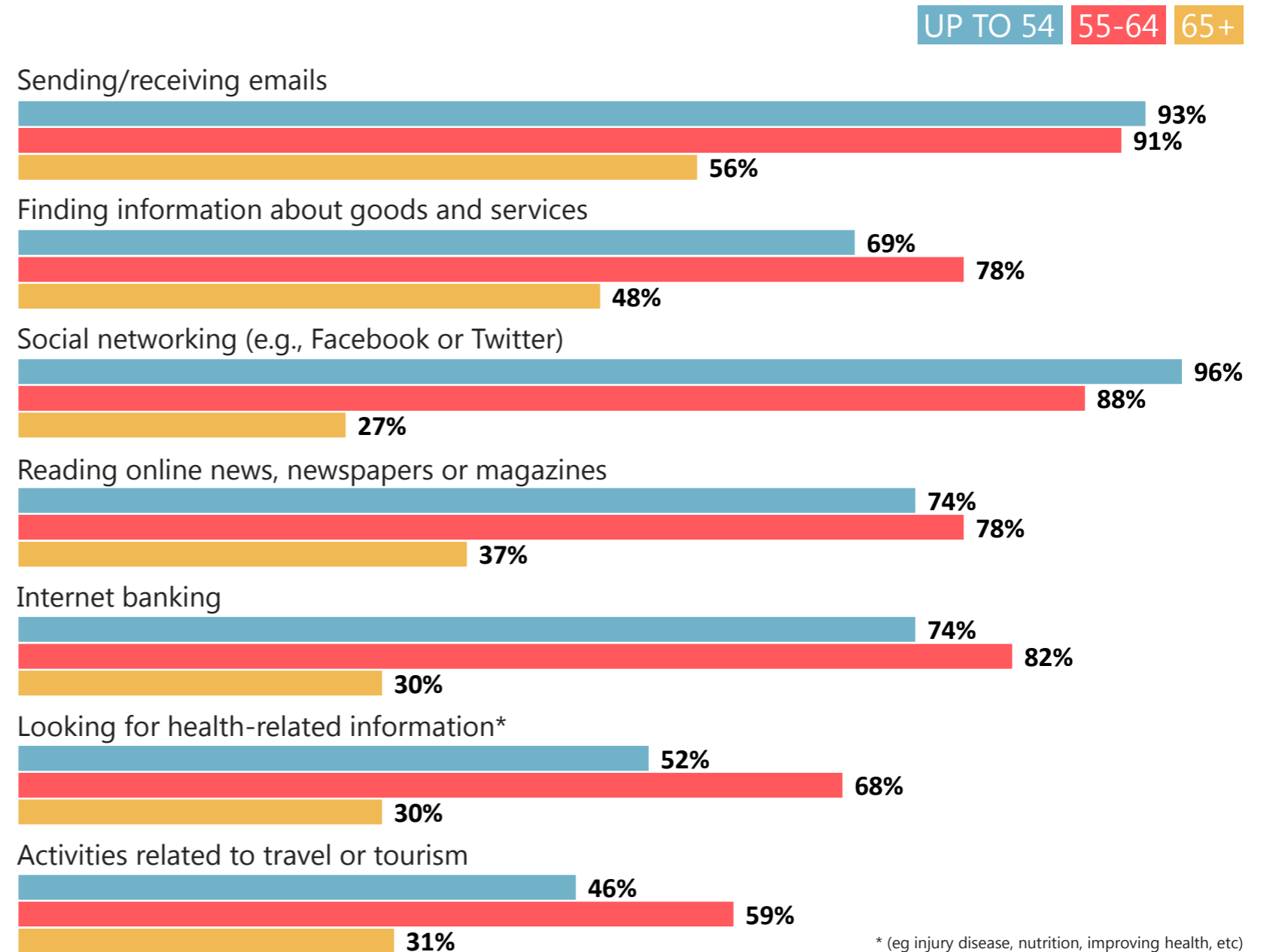


**Base:** 18,262 adults aged 16-64 across 29 countries, online, 24 Aug – 7 Sep 2018 **Source:** Ipsos Global Advisor

# OLDER PEOPLE IN THE UK ARE USING THE INTERNET TO COMMUNICATE AND FIND INFORMATION

% doing each activity in the last three months.

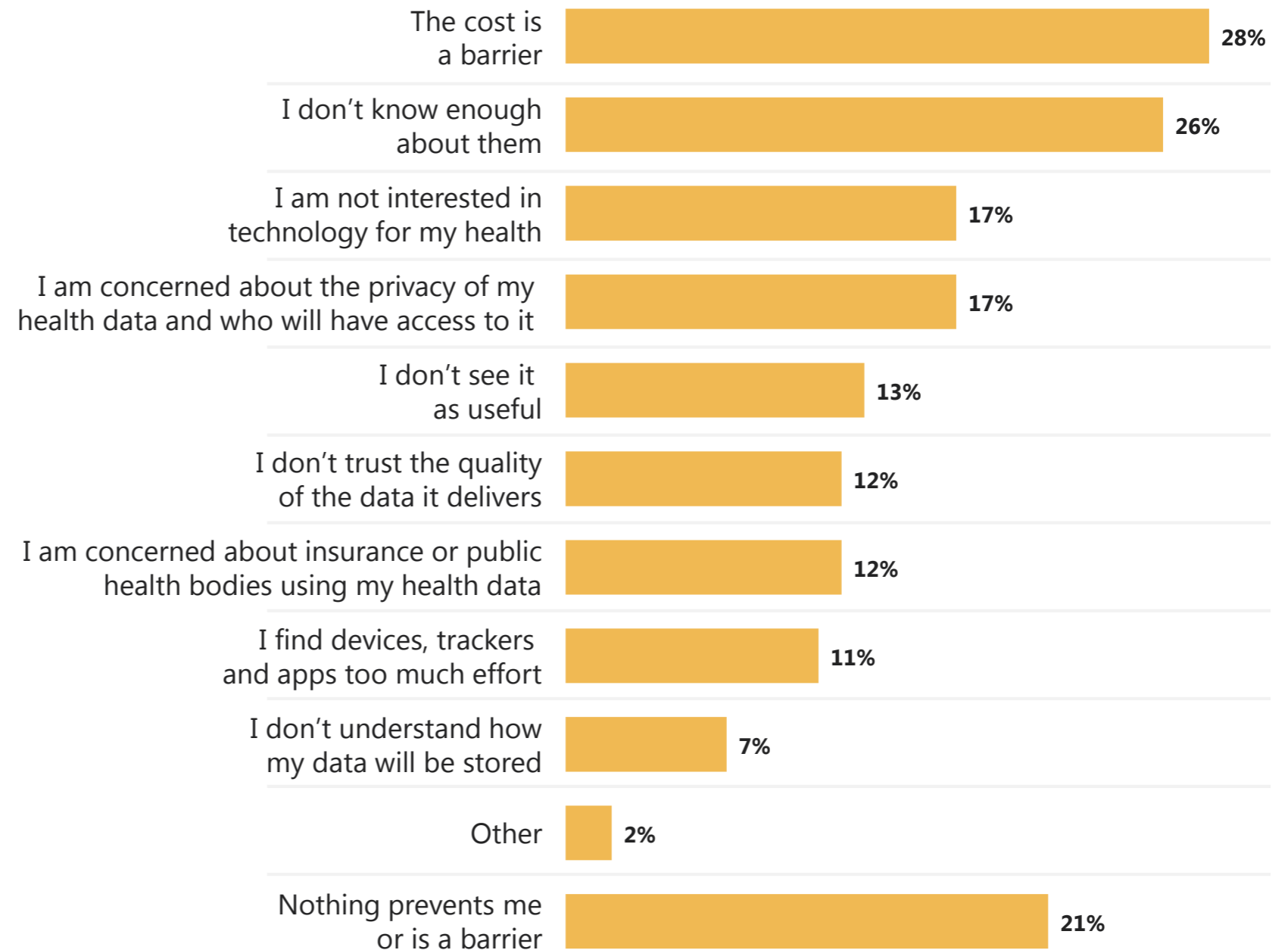
\*Top 7



\* (eg injury disease, nutrition, improving health, etc)

# COST, A LACK OF KNOWLEDGE AND INTEREST, AND PRIVACY CONCERNS ARE BARRIERS TO USING CONNECTED HEALTH DEVICES

**What, if anything, prevents you from using/owning a connected device or tool for your health?**



# HCPs ARE A BARRIER TO ADOPTION, TOO!



**18 to 24  
year olds**

Cost is the #1  
barrier



**25 to 40  
year olds**

Data  
privacy



**41 to 60  
year olds**

Low  
digital literacy

**60+  
year olds**

Low  
digital literacy

# DEVELOPMENTS IN CONNECTED HEALTH THAT BENEFIT ALL



**REMOTE PATIENT  
MONITORING**



**VIRTUAL  
REALITY**



**ROBOTICS**

# STEREOTYPES ARE AN INHIBITOR

*"Not interested in learning new things."*

Do not understand the latest techno-speak. They are more "casual users."

Be more distractible

Quickly lose interest

Take longer to learn or adapt to something new

Use different search strategies (in-person support, physical instruction manuals)

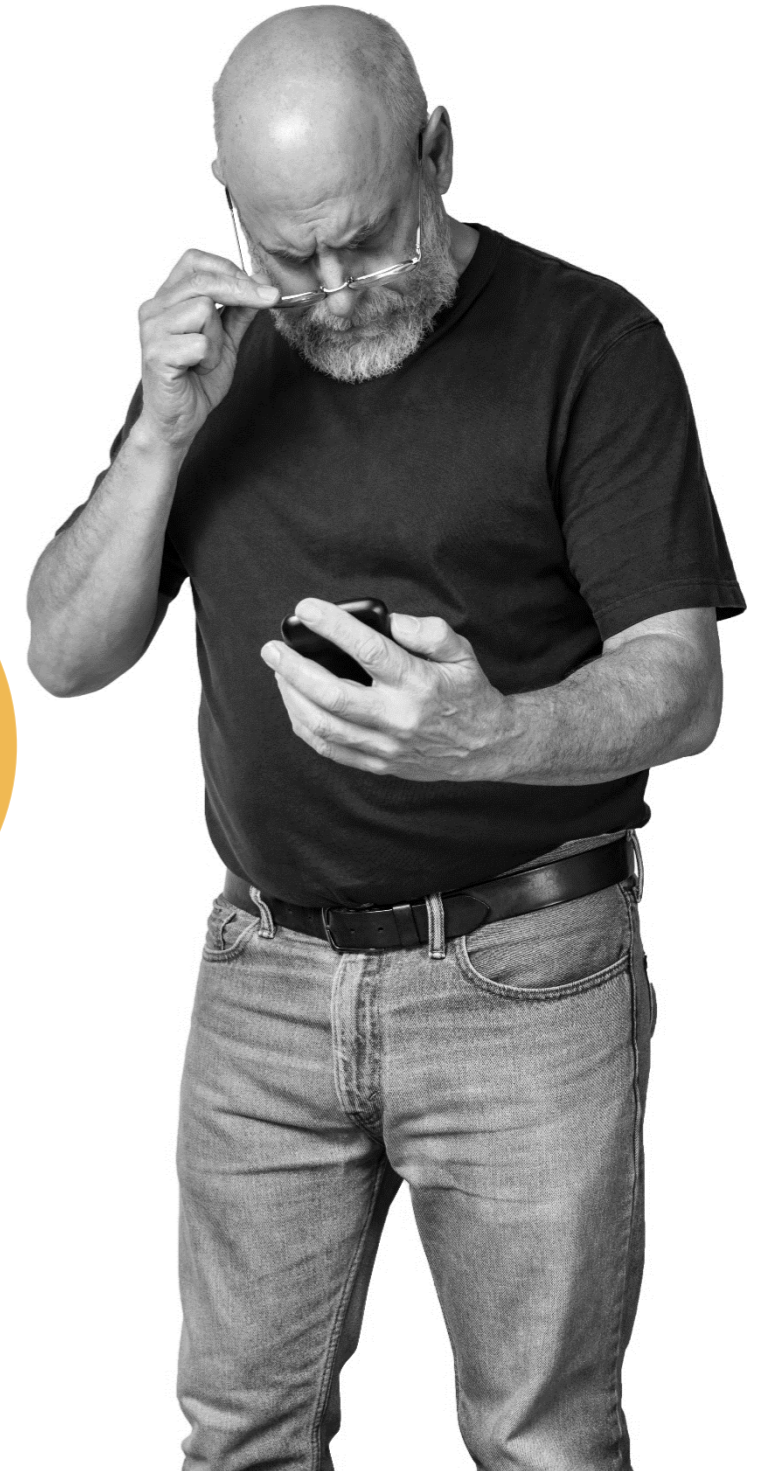
Take longer to complete a task

Take longer to learn new devices

Make more input errors

Perform worse on tasks that rely on memory

Have a harder time dealing with errors



**ONLY THREE IN TEN THINK THE  
MEDIA MAKES OLD AGE  
SEEM EXCITING**



# A NEED TO CHANGE THE PERCEPTION OF AGEING



82% of those aged 55+ say their favourite retail brand **no longer understands them**



54% want somewhere age-agnostic, which welcomes everyone



88% agree that brands should focus on **needs and interests**, not age

# Happy Birthday, Elizabeth!

*Celebrated 100 years on February 28, 2019*

**2015:**

**Email is my life line.** Receive and send email to California and receive loads of pix about my grandson in college. I even watch La Cross when they send me the code. **When I am curious about something, I Google for all kinds of info.**

**2015:**

Re pics of aging celebrities: "...now I do not feel too old at 96 ½". **I tell everybody that middle age starts at 70 now and old age about 90.** I did not do my travelling until after 65. Been up in a hot air balloon twice, at 75 and again at 92. My heart doctor said I could start planning my 100th birthday party. I guess that I am just an optimist. (How prescient was that!)

**2016:**

**The computer is the greatest thing that happened to me.**



# ENGAGING OLDER ADULTS

**Preferences** (Themes, genres, content)

**Abilities**

**Needs**

**Duration versus Frequency**

**Intellectual stimulation versus speed/action**

**Encouragement**

**Peer participation**



# NO PERFECT FORM FACTOR



**DIGITAL  
DIVIDE**

**PHYSICAL  
LIMITATIONS**

**USER  
PREFERENCES**

**USER  
ASSISTANCE**



**Break up letter!**

Dear tech product.....

Washing Machine a Simple  
Ding is enough ~~not~~ to convey  
a finished Load.

Talking Appliances... I am  
Breaking up with you because  
you Really Don't Give Me  
the info I actually Need



# FINAL THOUGHTS

# KEY FACTORS

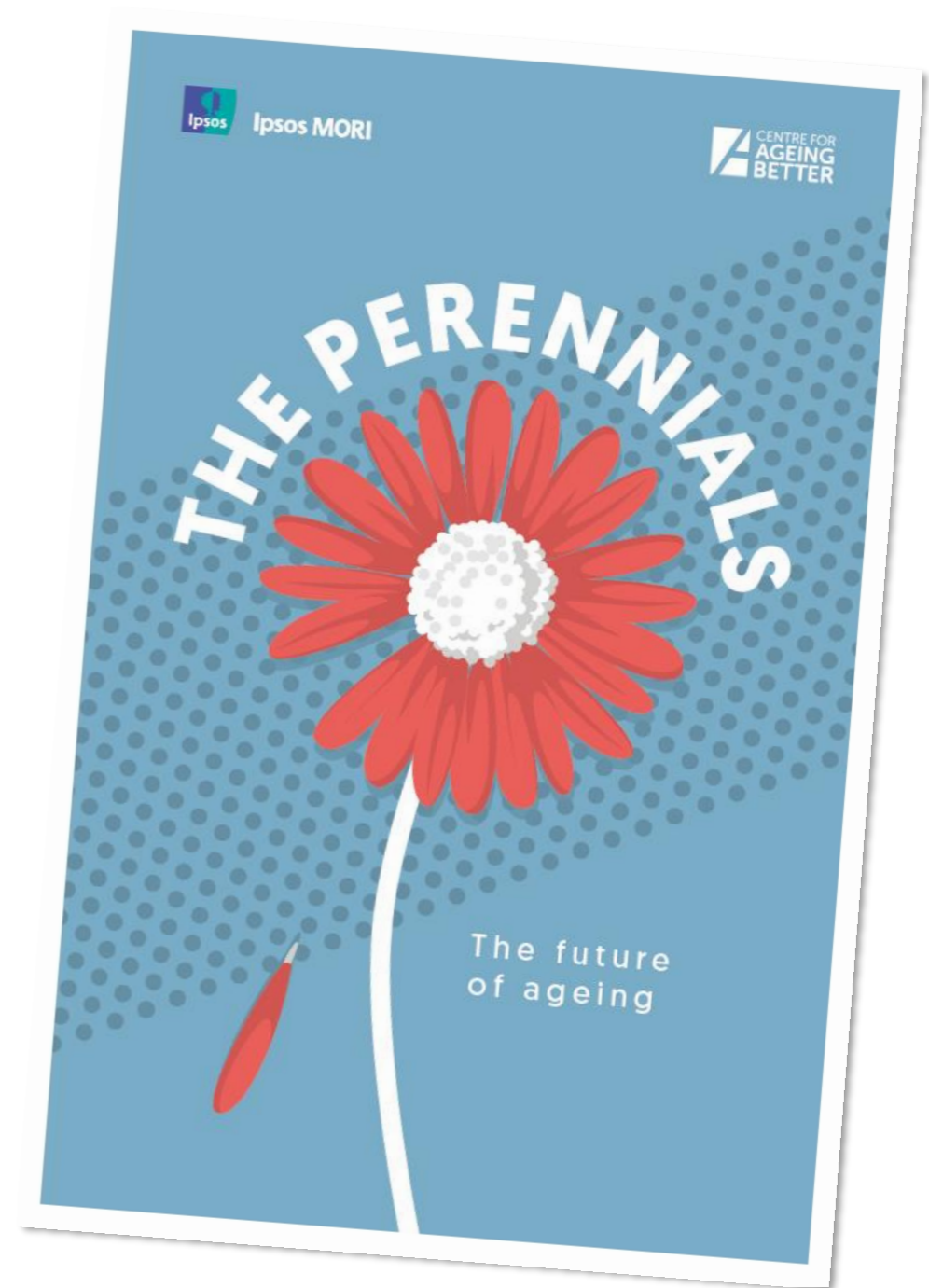
## WHEN CONSIDERING

## CONNECTED HEALTH

## TECHNOLOGIES



MUCH MORE IN THE REPORT  
AND ON MICROSITE:  
**THINKS.IPSOS-MORI.COM**



# Questions?



# Reach out to us!



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# Thank you.

