Summary of Milestone Report 3.4 – Market and Potential Analysis within the Demantec Project

Introduction

The milestone 3.4 builds on the milestone 3.1 as well as 3.2 and gives a market and potential overview of systems similar to system 1 and system 2.

System 1 (Life-Manager by Life-Partners) is described as an Information and Knowledge Platform which enables primarily care staff in nursing homes to communicate and to get information about residents with dementia. The overall aim of the system is to offer information regarding life story and current situation of a resident suffering from dementia. The system consists of six different modules named Contacts module, Message module, Video module, Calendars module, Gallery module and Menu module.

System 2 (IntelligentCARE by ANYgroup) is named Security System and can send alarms via sensors in case unsafe situations occur for residents with dementia. This system ensures safety and security in order to enable care staff to act quickly in emergency cases and other critical situations. Sensors that are used within Demantec are bed sensor, door sensor, emergency call and door lock sensors.

Methods of the Market and Potential Analysis

The first step of the market analysis was to define a target market by using specific criteria. In the background of these inclusion and exclusion criteria the researchers gathered products via research on the internet as well as via a survey which was sent out to the companies of relevant products.

The results of this conducted market analysis build the foundation for creating the potential analysis including a strength and weakness profile. For the potential analysis, the assessment criteria Usability, Interoperability, Languages, Data privacy and Service were defined. The single sub-criteria which are described in the following have a different weighting (refer to values in brackets) regarding the rating points.

Regarding the Usability of system 1 and similar systems the Navigation (2), Colors (1), Size of Symbols (1) and Clarity (1) are determined as sub-criteria. With regard to system 2 and similar systems Wearing comfort/Visibility (2), Installation (2) and Navigation (1) are defined sub-criteria.

The criterion Interoperability contains the sub-criteria With other systems (1), Diversity of hardware (2) and Diversity of interfaces (2).

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1 It is possible to include the menu module. This depends on the decisions of the nursing homes. They decide if they want to include this module according to effort (cooking and photographing menus in advance) and value.
Languages as criterion consists of the sub-criteria German (1-2), Danish (1-2), English (1) and others (1).

The sub-criteria concerning Data privacy are defined as Data security declaration (1), Data security standards (1), No transfer of data to third parties (1), Password protection (1) as well as Encrypted data exchange (1).

The criterion Service is divided in the sub-criteria Free updates (1), Individual configuration (1), Remote maintenance (1), Free workshops/training (1) and Others (1).

The potential analysis pursues the goal to identify strengths and weaknesses of Life-Manager by Life-Partners (System 1) and IntelligentCARE by ANYgroup (System 2) in comparison to similar products on the German and Danish health care market.

Results of the Market and Potential Analysis

Within the market analysis respectively seven companies including Life-Manager and IntelligentCARE which provide similar products for system 1 and system 2 met the defined inclusion criteria. These six products for each system were assessed by the identified criteria. The results were displayed in radar charts for each criterion.

Health and Welfare Technologies similar to System 1

The criterion Usability achieved the highest scores with regard to all compared companies. Three products were assessed with the highest possible score of five. Deficits became obvious concerning Interoperability. Four of the six competitors achieved a score of one or zero. Regarding the criterion Languages, it can be observed that all products are available in the native language. Only a few companies provide their product in both German and Danish. Most of the products do not transfer data to third parties and are password protected. Nevertheless, two products do not have a data security declaration even though Data privacy is a very important criterion. Moreover, with regard to Service many companies do not provide free workshops or training for care staff, but all companies offer free updates.
**Figures**: Radar Chart regarding System 1 (Radar Charts regarding single criteria in the annex)

**Health and Welfare Technologies similar to System 2**

Also, with regard to system 2 the *Usability* is assessed with the highest scores. The results of the criterion *Interoperability* are various. One product achieved the highest score of five while two other products only were assessed with one point. Concerning *Languages*, the results were very similar to system 1. However, there are remarkable deficits regarding *Data privacy*. Three of the six competitors achieved zero points due to missing information referring to the determined sub-criteria. Only one competitor could meet the most of sub-criteria. Furthermore, there is a need of improvement of *Service e.g.* due to none of the competitors provides remote maintenance. However, all competitors provide the service of individual configuration.
Conclusion

In this market and potential analysis, products which are similar to Life-Manager and IntelligentCARE were considered. Within the whole analysis, the customer perspective was chosen so that the approach data depended on publicly available information.

Furthermore, the investigated products were not tested practically within this research. Additionally, not all competitors replied to the sent out survey. The products are not entirely comparable due to different characteristics of all products. Nevertheless, this analysis provides important information regarding potentials as well as limitations of the considered products.

Especially the Usability of both systems achieved positive results. A good Clarity and Navigation as well as an uncomplicated Installation seem to be basic prerequisites. While there are a few competitors which provide solutions with a high Interoperability, the most companies do not fulfil this criterion. With regard to the criterion Languages, many competitors of both systems provide their product besides the native language also in English which can lead to a higher market potential. The Data privacy is especially in the health care sector a serious issue due to dealing with very sensitive and confidential data. The existing
lack of information can create suspicion of the users. Additionally, concerning Service an immense lack could be observed within the research.

All things considered, the market and potential analysis identified remarkable shortcomings regarding a few of the criteria. Anyway, the analysis shows also good practices. The analysis is a good foundation for IntelligentCARE and Life-Manager to find their position on the German and Danish market.
Annex

Figures: Radar Charts regarding System 1
**Figures:** Radar Charts regarding System 2
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