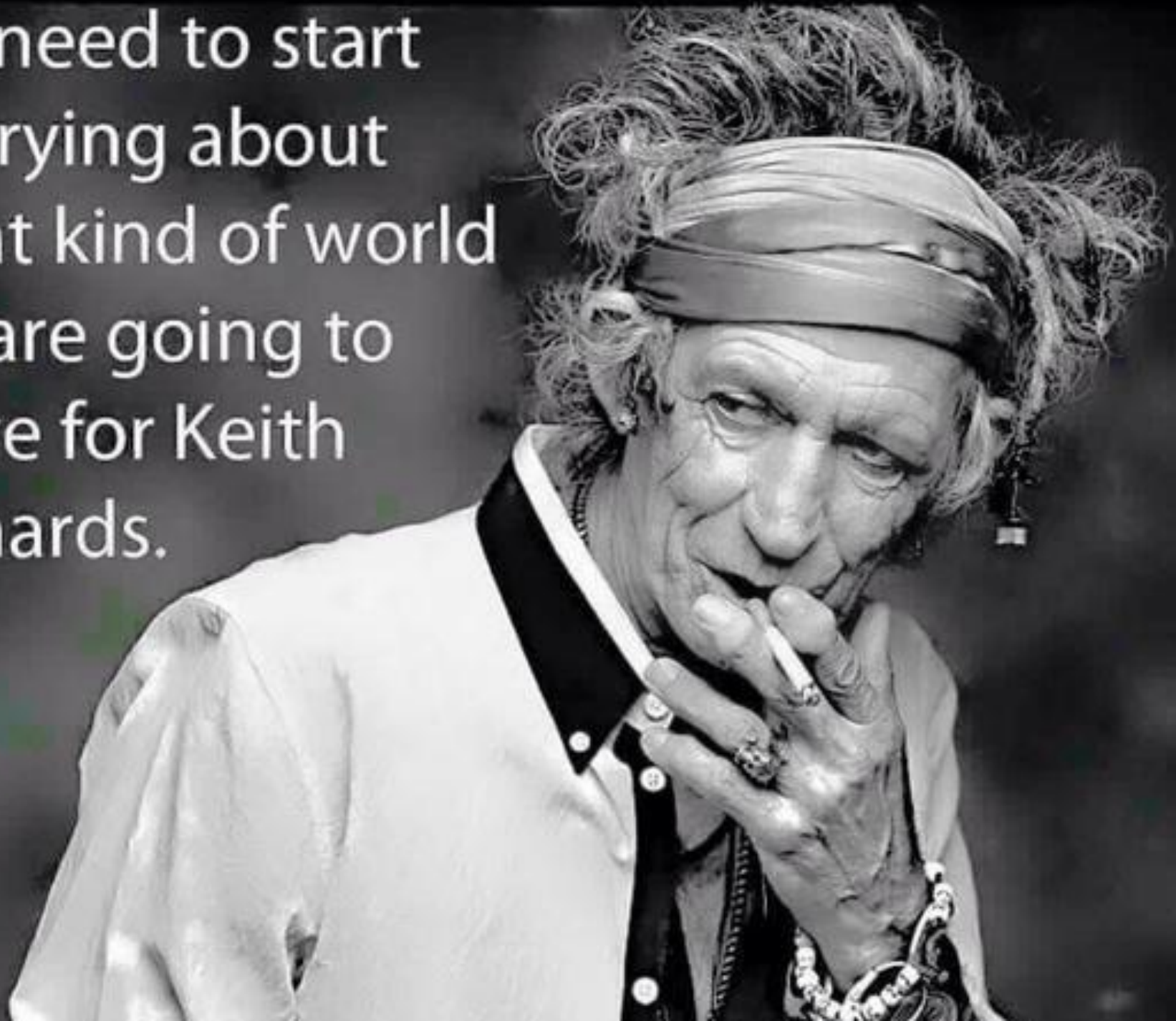


# AGING IN PLACE: CONTEXT MATTERS

Framing the issues, challenges, and opportunities

We need to start worrying about what kind of world we are going to leave for Keith Richards.



# Context Matters

Designing and modifying the physical home is only part of the answer to successful aging in place. Equally important is marketing the community and social aspects that give life purpose and meaning, also known as the social determinants of good health.

- ▶ Four Pillars best represent these issues: Home Modification / Aging in Place / Home Care / Family Caregivers.
- ▶ All Canadian Communities are at a crossroads, driven in part by baby boomers, ... the demographic transition we are in is like no other in human history.

# How large is the Aging-in-Place /Home Modification Market?

- ▶ Older Canadians now represent the fastest growing consumer marketing segment in Canada. And they will double over the next 2 decades.
- ▶ In 2018, they represented the largest share (70%) of the spending within Canada's \$85 Billion home modification/renovation spending.
- ▶ According to CMHC research, 90% of aging boomers surveyed stated a preference to "Age in Place" - even if there are changes to their health.
- ▶ Home Ownership in Canada has dropped at all age levels EXCEPT older adults, up 2 percentage points in the past year to 72.1%. Home equity allows for big buying power.
- ▶ Market Size: 5.4 million older adults PLUS 2.9 million Canadians living with a disability which is a core segment of the Home Modification market. Total Market Scope: 8.3 million adults and it is growing by double digits for the next several years.

# What is Aging in Place?

- ▶ AIP refers to having the proper health and social supports to allow one to live in their home or community as long as they live.
- ▶ Keys to aging in place: modify to your mobility issues AND your physical/home environment

# According to the Canadian Survey on Disabilities ...

- ▶ “Mobility disabilities in Canada more than doubled between 2012-2017 from 266,000 to 620,000.”
- ▶ Since 1999, we have had no significant INCREASE in funding for Home Modifications. The biggest challenge to keep those with mobility issues out of institutions and hospitals and aging at home where they belong and wish to reside. Yet other countries such as the UK and Japan have quadrupled their funding. UK in 2019 Budget for Home Mods: \$850 Million dollars Canada: \$40 Million.

# Family Caregivers ...Why are they important to Aging in Place?

- ▶ 8.5 million and two million per year more for the next several years

Almost all of family caregivers will make adjustments to the home for delivering care. Over 50% will make extensive modification to the home and if you are caring for someone with a disability the ramps, elevators, bathroom and entryways will be necessary and can cost in the thousands of dollars.

- ▶ The average family caregiver in Canada is a woman, 48-52 years old, and will care longer for her parents than her children in that household.
- ▶ Family Caregivers are not part of the public healthcare system. They are consumers just like you and me.

# How some brands understand and connect with their family caregiver customer





# Canada Health Act - Context Matters!

- ▶ Canada's provinces are struggling now more than ever to meet the rapidly growing needs of its aging population.
- ▶ When Canada established its universal health care system in the 1960's the average age of Canadians was only 27 years and life expectancy was less than 70 years.
- ▶ Over 430,000 adult Canadians were recently estimated to have unmet home care needs, while 40,000 Canadians are on wait lists for long term care, due in part because of lack of available home or community-based care.
- ▶ Ipsos study 2019 found that 88% of respondents worry about their own health care costs with 58% saying that they will delay retirement in order to afford the health care they need to age in place.

# Canadians receiving Home Care, 2017 Research Results (IHPSS)

- ▶ 59% over the age 75
- ▶ 43% describe their health as fair or poor
- ▶ 53% have 3 or more chronic conditions
- ▶ 59% are taking 5 or more meds
- ▶ 46% live alone
- ▶ 54% started receiving home care services after a hospital stay
- ▶ A separate study done in Winnipeg found that 90% of recipients required full assistance with their ADL's, and 50% had some cognitive impairment

ALL WILL NEED HOME MODIFICATION OF SOME DESCRIPTION.

# Home Modifications, Aging in Place are practical solutions, BUT ...

- ▶ Aging in Place can be a polarizing concept for many Canadian families.
- ▶ Most homes are ill-equipped to serve the needs of an aging population.
- ▶ Home owner is attached to his/her home. Powerful bond.
- ▶ Easiest and Fastest is Replace and Repair/upgrade/modify
- ▶ Most renovator/contractors ill-trained to deal with older customer needs or young families, relating to health and home modification.
- ▶ Most home building products/manufacturers not designing for older adult market.
- ▶ Funding sources, tax credits, reverse mortgages aligning with Aging in Place but nobody knows.
- ▶ Family caregivers are huge buying influence for aging parents. 50% of family caregivers will modify for care delivery in the home.

# Myths vs Realities

- ▶ Home owners want to be pro-active about aging in place but don't know how and most renovator/contractors are not providing them with the right product ideas, programs, and expertise that can answer their personal challenges in their home, particularly as concerns their health and mobility as they age in place.
- ▶ Solution: Occupational Therapist/C-Caps - Certified Aging in Place Specialist/National CHBA Portal
- ▶ Solution: Awareness and Education by all sectors of the Aging in Place economy.

# Top Renovation Projects in Aging In Place

- ▶ 48% bathroom
  - ▶ 24% entrance or stairway
  - ▶ 20% kitchen
  - ▶ 16% home exterior
  - ▶ 9% the whole home
- ▶ Need to change the conversation between what the home owner needs and what the renovator/builder can deliver ... to embracing projects that all can universally embrace. Our experience indicate showrooms, big box retailers interior designers, architects not keeping up with changing older adult customer renovation needs.

# Smart Home Technology - NEW market driver

- ▶ No discussion is relevant if we do not discuss the transformation that Smart Home Technology is having within the Aging in Place discussion.
  - ▶ Smart Locks
  - ▶ Smart Home Security
  - ▶ Smart Lighting
  - ▶ Smart Sensors
  - ▶ Smart Appliances
  - ▶ Smart Thermostat
  - ▶ Voice-Activation, IoT, wearables etc.
  - ▶ Rise of online sales of assisted devices at Ebay, Amazon and others

# The top 5 technologies identified by Harvard and MIT Age Labs for AIP in 2019

- ▶ Telehealth
- ▶ Medical Management Systems
- ▶ Medication Management Systems
- ▶ Smart Fall Detection Systems
- ▶ Smart Beds / Sleep Sensors

# 2020 will be a break-out year for Aging in Place

- ▶ Hopeful that Ottawa will announce a National Seniors Strategy that will focus money and policies on Aging in Place.
- ▶ A women giving birth today will care longer for her parents than for her children.
- ▶ 2 Million more new family caregivers next year that will be seeking information on helping their parents (and themselves) age in place.
- ▶ Occupational Therapist role will begin to transform home modification process through home assessments, clinical tools, online services such as fall detection and prevention .
- ▶ CHBA Home Modification Council will launch two major national programs to support Aging in Place



# Occupational Therapist role in Aging In Place/Home Modification

- ▶ OT's perform home assessments for social agencies, insurance companies, and older home owners, working directly with renovator/contractors, interior designers, architects and builders.
- ▶ OT's consult on design requirements, fixtures, for those living with a disability, stroke recovery, and are key stakeholder in fall prevention.
- ▶ There is no effective consumer approach yet for home modification for older adults or people with disabilities which causes headaches and perplexity...
- ▶ An OT's involvement allays much of the fear of living safe and independent for the homeowner.

# Like any market under transformation, there are challenges and opportunities

- ▶ Aging in Place has a high degree of need and a low degree of products and services, training, education, and understanding. Opportunity!
- ▶ Governments have not been prepared for the tsunami of older adults and now are scrambling to ensure that Canadians have access to high quality, integrated care to deliver to the home.
- ▶ Need to bring various sectors together, there are suitable products and services for aging in place but they are not pulling together, coordinating efforts or promoting effectively.
- ▶ Home Modification Canada - 2015 - organized, funded, and chaired by Caregiver Omnimedia became the CHBA Home Modification Council in 2017

# What's needed - Best Practices

- ▶ Need for awareness/education of the benefits and availability of home modification/aging in place
- ▶ Assistance helping older adults access the players, advice, funding, practical help from renovator/contractors and building products manufacturers and assistive device industry.
- ▶ Expedite “speed to market” - hip replacement surgery, arthritic knees, stroke, cancer, hit suddenly with no time to plan – the modification needs are urgent and important to the life of the customer. Boomers aren't waiting for this but are forging ahead (usually without professional advice) and create costly re-do's and overruns due to lack of proper information and education.

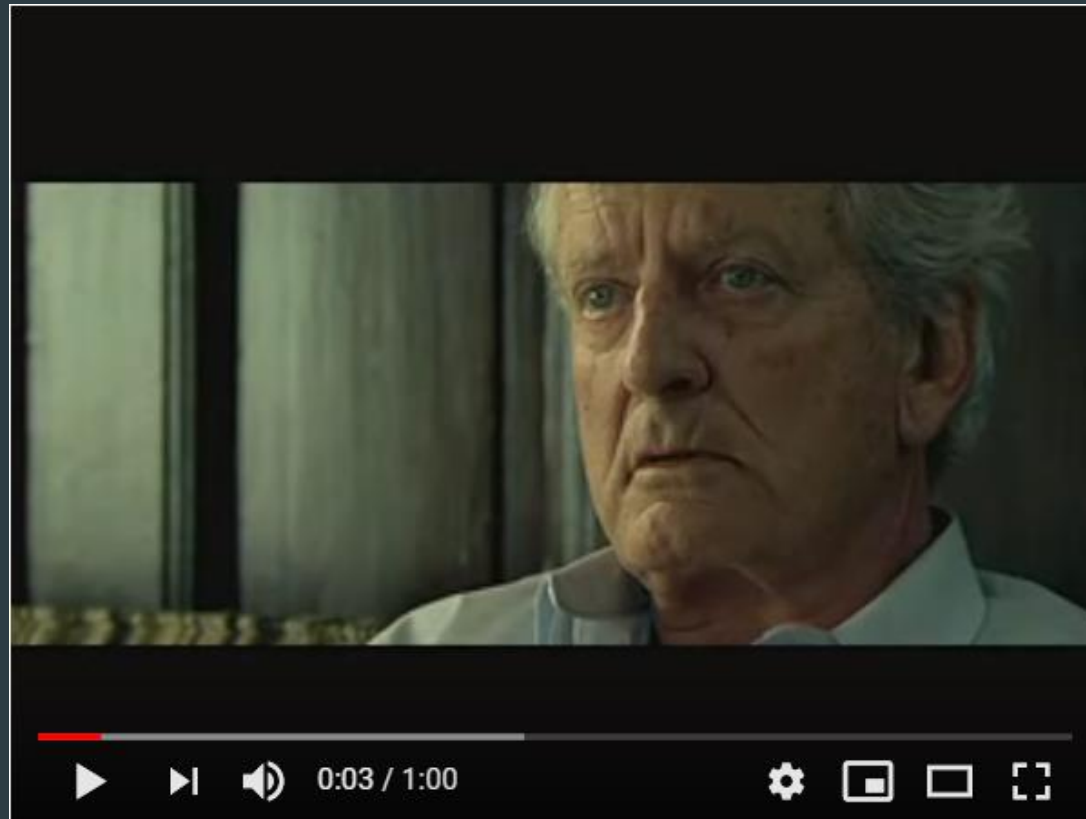
# Cont'd: Best Practices

- ▶ Involve the consumer/homeowner in the early design process with OT and renovator and funder.
- ▶ Hire a Certified Aging in Place Specialist (more later) Canadian CAPS Course - CHBA
- ▶ Integrate the home modification with customer home and community or social care plan
- ▶ Link home modification with any new build or renovation-future planning
- ▶ Become knowledgeable about social, municipal, affordable housing - build relationships ... most municipalities are in the dark.
- ▶ Make training ambassadors of your sales and service, installation team in Aging in Place for you and your brands.

# National Portal Demo

The screenshot displays the Home Modification Canada website interface. At the top, there is a navigation bar with links for Search, My Listings, My Calendars, My Referrals, My Groups, and a user profile for Jeffrey Doleweerd. The main header features the site's name in large red and black letters. Below this is a search bar and a navigation menu with categories: Home Modification, Mobility, Professional Services, and Help at Home. The 'Home Modification' category is expanded to show 'Bathroom' as the selected item. A map shows the location of a search result at 9550 Pines Valley Dr, Woodbridge, ON L4L 1A6. A pop-up window provides details for 'Bathroom Modification', including a description: 'The bathroom can be the most dangerous place for people with physical or cognitive disabilities. Without the proper layout, and non-slip materials on floors and walls, one may slip and fall, causing significant injuries. ADL provides many approaches that will make it easier and safer for one to use their shower, sink or toilet.'

# Corporate Players Marketing Messaging in Aging in Place - Family Caregiving



Call for a meeting with your senior leadership team and let us show you how AIP is impacting you, your customer, and your company

► Powered by Caregiver Omnimedia / Presented to your Corporation

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[www.homemods.ca](http://www.homemods.ca)

# Caregiver Omnimedia Inc.

- ▶ Formed in 2003, Caregiver Omnimedia was founded to connect, engage, and inform family caregivers, with a focus on caregiving for aging parents. With a mother with Alzheimer's and a father with cancer, Don Fenn, founder was living the experience. With over 100 years of collective media sales and marketing management, brand management, and agency experience, the Caregiver team observed the huge gap on how the market perceives, portrays, and engages older adults as consumers ... with a special focus on their caregiving needs.
- ▶ In 2012, Caregiver Omnimedia anchored national research with partners, GE Health, Philips Healthcare, and We Care Home Health Services through AngusReid Vision Critical. The results changed the company direction to focus on aging in the home, as 50% of family caregivers were modifying their home for care delivery.
- ▶ In 2016, Caregiver Omnimedia founded Home Modification Canada with 40 industry partners and in 2017 HMC became a National Home Modification Council under the governance of the non-profit Canadian Home Builders Association. A number of priorities have been set in place to escalate the needs of burgeoning Canadian population to age in place.
- ▶ Partnering with industry and CHBA on several fronts ; national portal, training, resource consumer guides and websites Home Modification Guide 2020, certification programs and brand building.



# Post Presentation Discussion

- Consumer Reports: Kitchen and Bath Fixtures Trend Report reflect impressive expansion to 2027, particularly in Aging in Place features, smart technology, black stainless, freestanding tubs, deeper sinks, and colour choice are gaining wider acceptance.
- Identify and re-build core strategies around a differentiated core competitive advantage: Aging in Place/Home Modification.
- Market education & research consumer/trade. Continually educate all users.
- Older adult market for senior care, while not sexy is vital and challenging. Older consumers find it hard to compare prices or trust anyone.

# Opportunities through partnership with Caregiver Omnimedia and their partners.

- ▶ Category exclusivity for 1 year
- ▶ Sponsorship of Conferences/Webinars/C-CAPS/
- ▶ Participation in 60 older adult product fairs throughout Ontario
- ▶ Create your own product catalogue for AIP/Home Modification
- ▶ Sponsorship of Occupational Therapists workshops on AIP/HomeMods
- ▶ Participation in Open Doors Trade Shows with March of Dimes Canada
- ▶ CHBA Home Modification Council Membership (3 yearly meetings).
- ▶ Sales Training courses for internal sales and marketing Trade and consumer
- ▶ Aging in Place/Home Modification News and Resource Guide

# Some ideas/opportunities

- ▶ Website lead generation for Aging in Place/Home Modification - Renovators
- ▶ Social Innovation Marketing Program
- ▶ Aging in Place Podcast participation /sponsorship
- ▶ Messaging copywriting for Aging in Place
- ▶ Sales consultation to Home Health Retail community (SHHC - Motion Specialities, etc.).
- ▶ National Research Program - AIP in 2020
- ▶ BC/Ontario data mining program - HH ownership 65 plus by market
- ▶ Special showroom tour by market -DF presenter.