

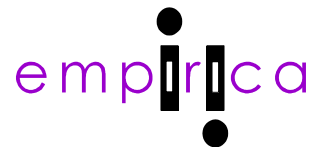


# Older People & Technology

- Results from the European SeniorWatch surveys -

by

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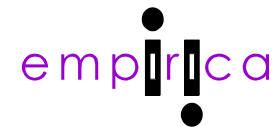
[www.seniorwatch.de](http://www.seniorwatch.de)

**ICAT 2002, 24th-25th April, 2002, Pride Park Stadium, Derby**

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# Research context

- a study to better understand the market dynamics of IST geared towards older people
- funded by the EU under the Information Society Technology Programme (1998-2002)
- project consortium:

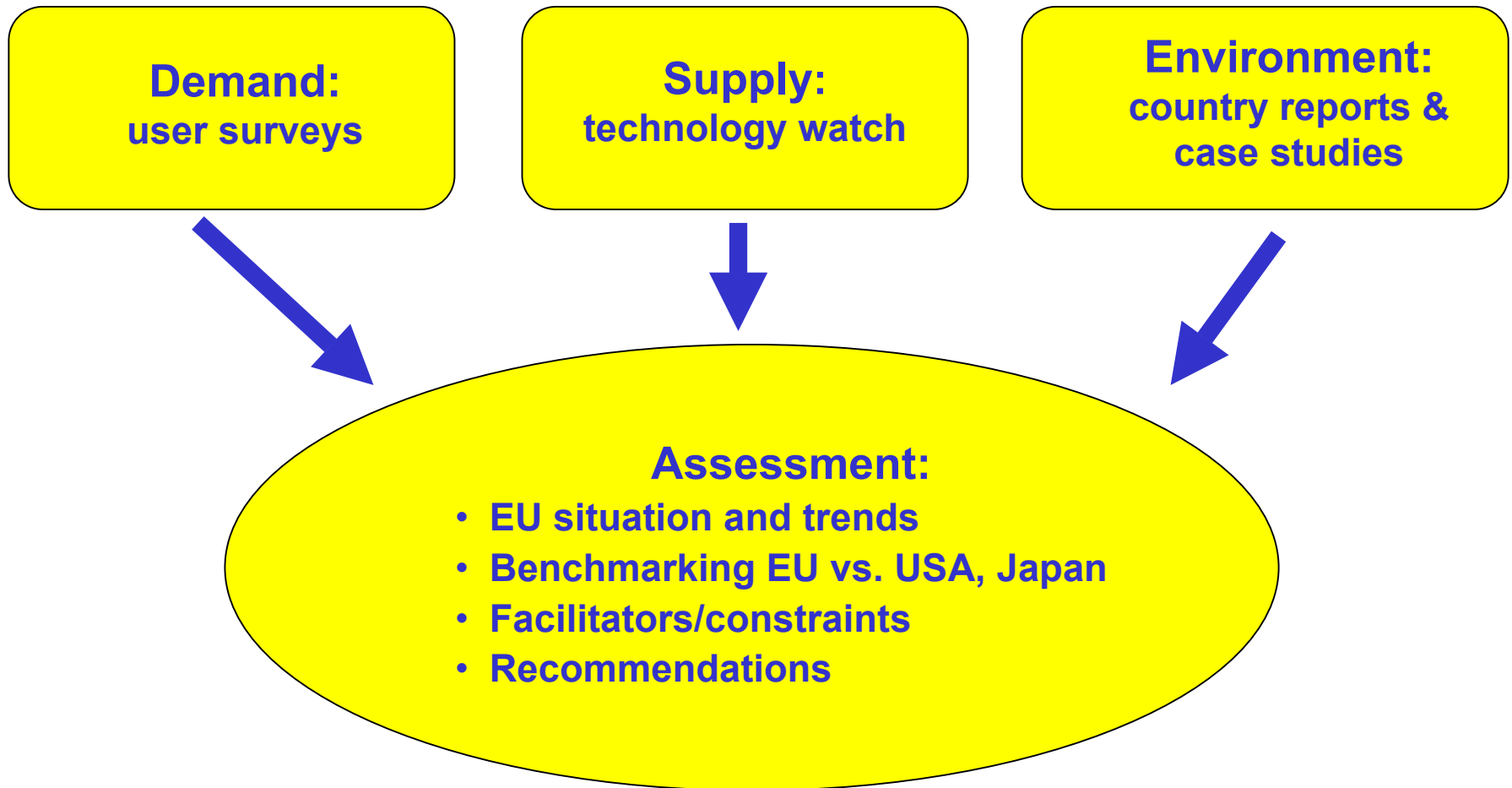


- subcontractors in Europe, USA and Japan

# Project rationale

- **help and encourage European industry to address market opportunities**
- **enable policy to really influence the current situation and to benchmark achievements (EU vs. USA, Japan)**
- **inform citizens about what is now possible with the support of IST**

# Holistic approach



# Lack of EU-wide data

- **To what extent do older Europeans already use IST ?**
- **What IST applications/devices would older Europeans be interested in ?**
- **What factors do facilitate/constrain further uptake of IST among older citizens across Europe ?**

# The user surveys

## *Older Population Survey (OPS)*

- 9661 respondents aged 50+
- field work during June/July 2001

## *Decision Maker Survey (DMS)*

- 512 decision makers from organisations providing home care services to older people
- field work during July/August 2001

# Demography of OPS respondents

<b>Age:</b>	<b>Household size:</b>
50-59.....36%	one person.....22%
60-69.....31%	two persons.....48%
70-79.....25%	three persons+.....30%
80+.....8%	<b>Type of area:</b>
	rural/ small town.....65%
	urban/ suburban.....35%

## IST access and usage of EU 50+ population

### Access:

Standard TV.....	98%
Cable TV.....	30%
Digital TV.....	13%
Mobile Phone.....	48%
PC.....	36%
Notebook/Laptop.....	5%
Internet.....	22%

### Usage:

Teletext (on TV).....	45%
Mobile Phone.....	42%
Computer.....	27%
Internet.....	17%

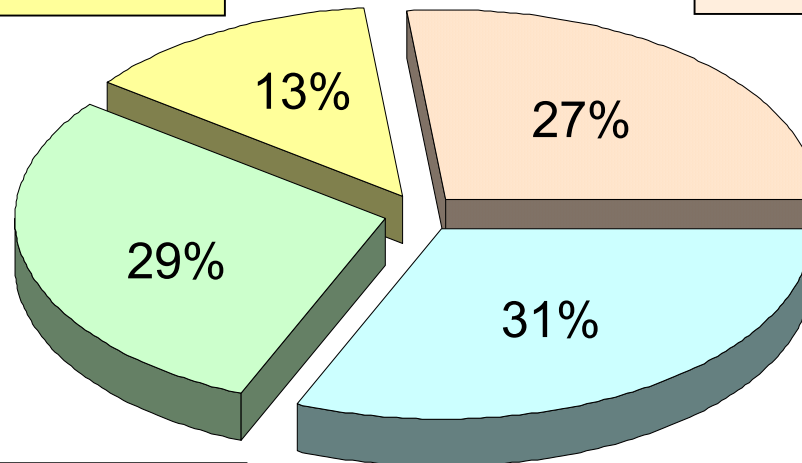
# Typology of IST involvement

## The “old age beginners”

- computer users
- less skills / using computers less often

## The “experienced frontrunners”

- computer users
- advanced skills or frequently using computers (>once a week)



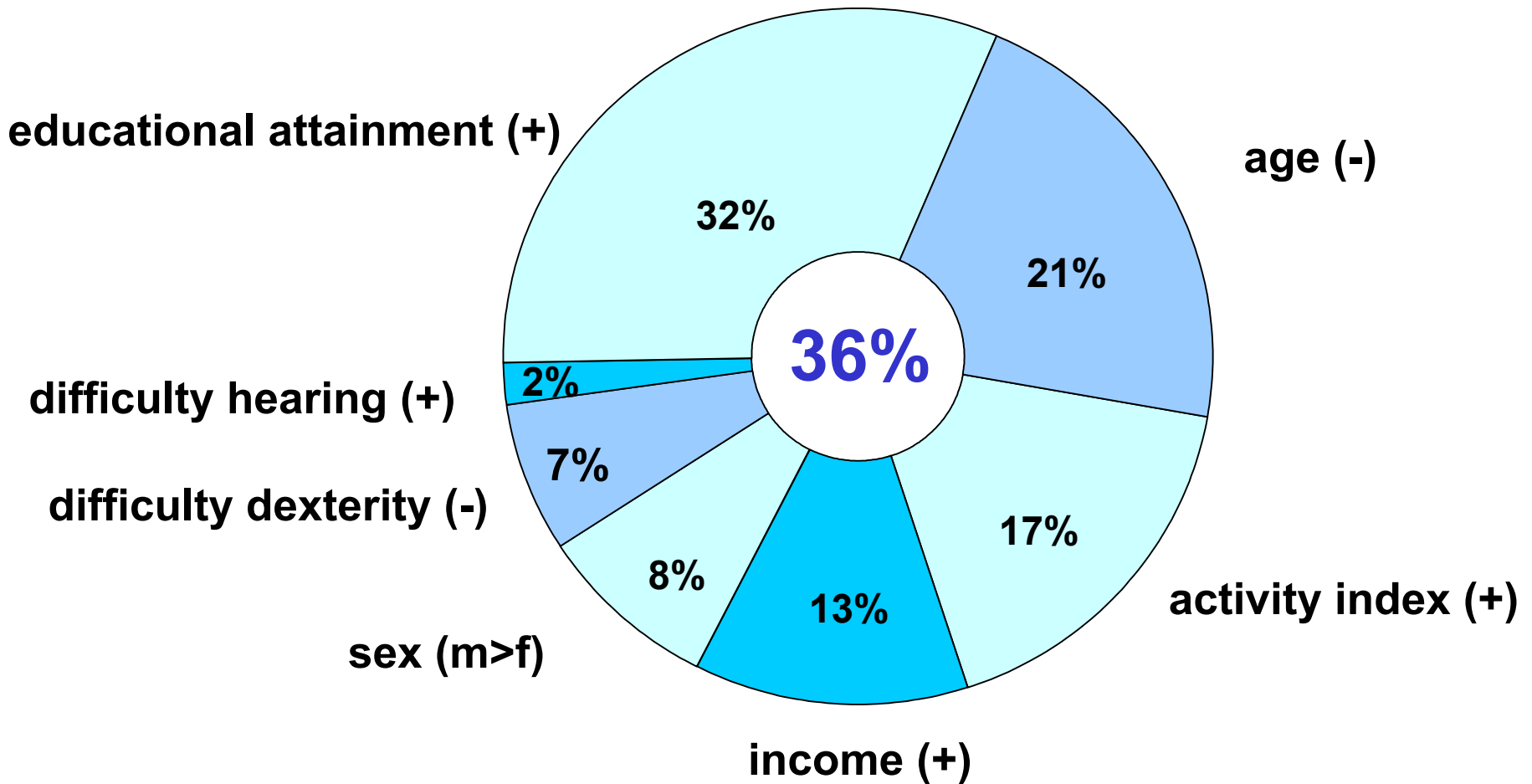
## The “technologically open-minded”

- non-users
- keen on learning or wishing to improve computer skills

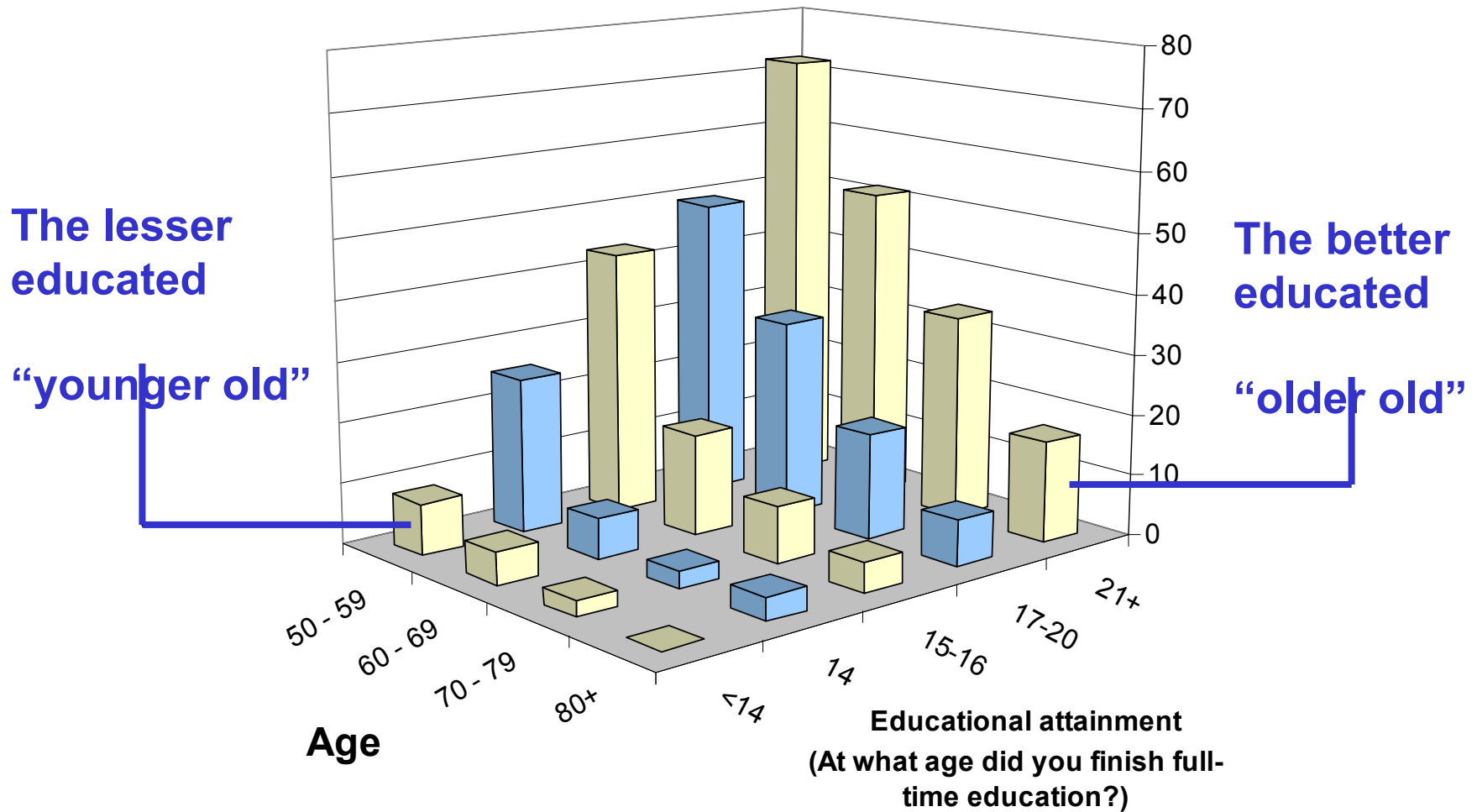
## The “digitally challenged”

- non-users
- neither keen on learning nor wishing to improve computer skills

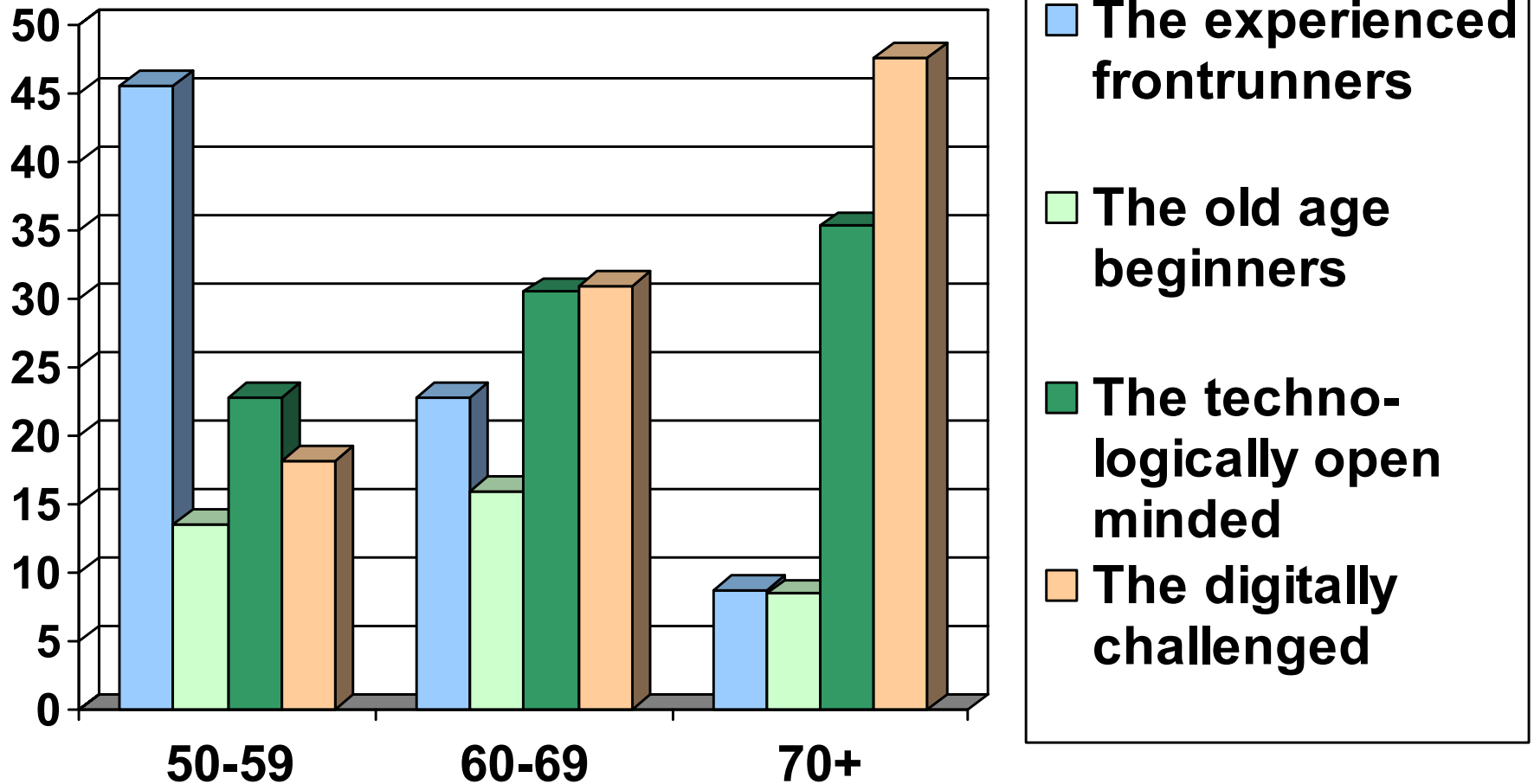
# Factors influencing IST involvement



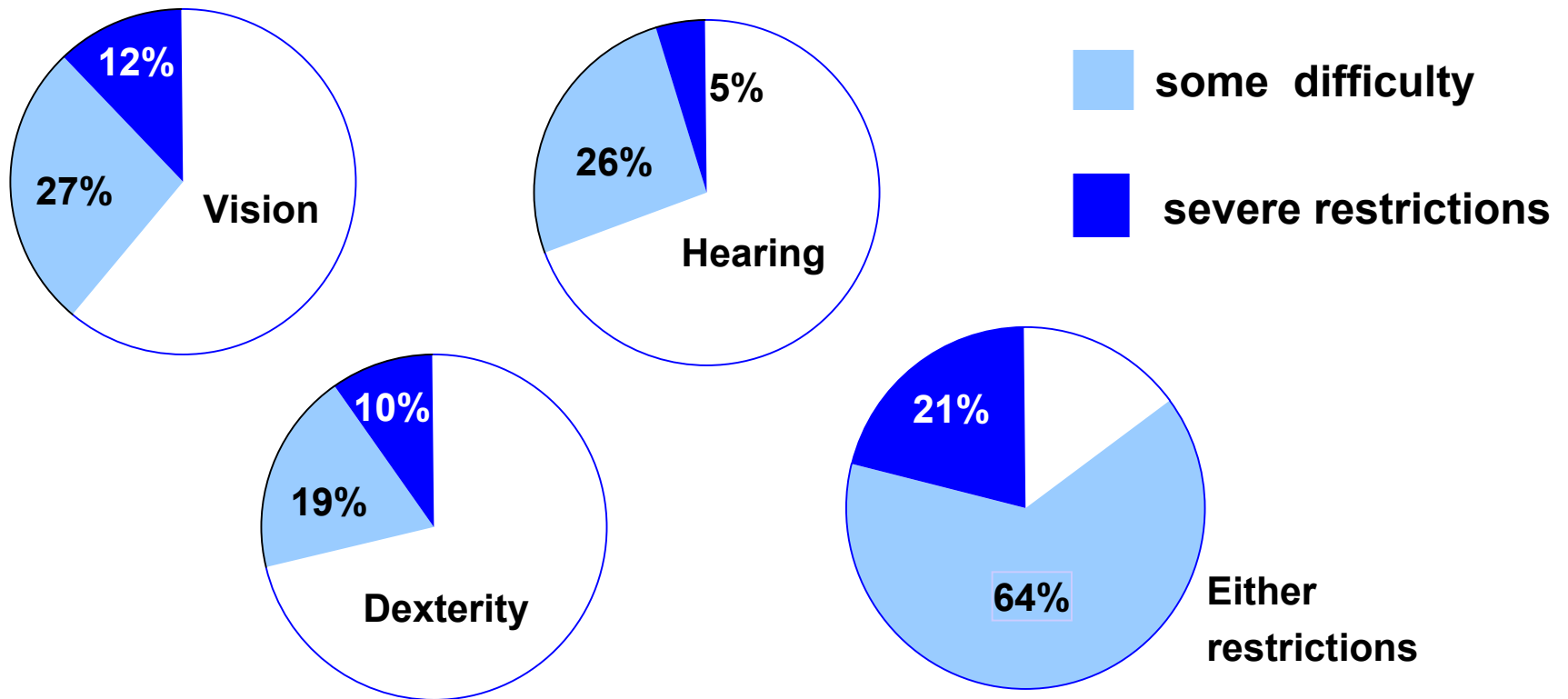
# “Experienced frontrunners” by age/education



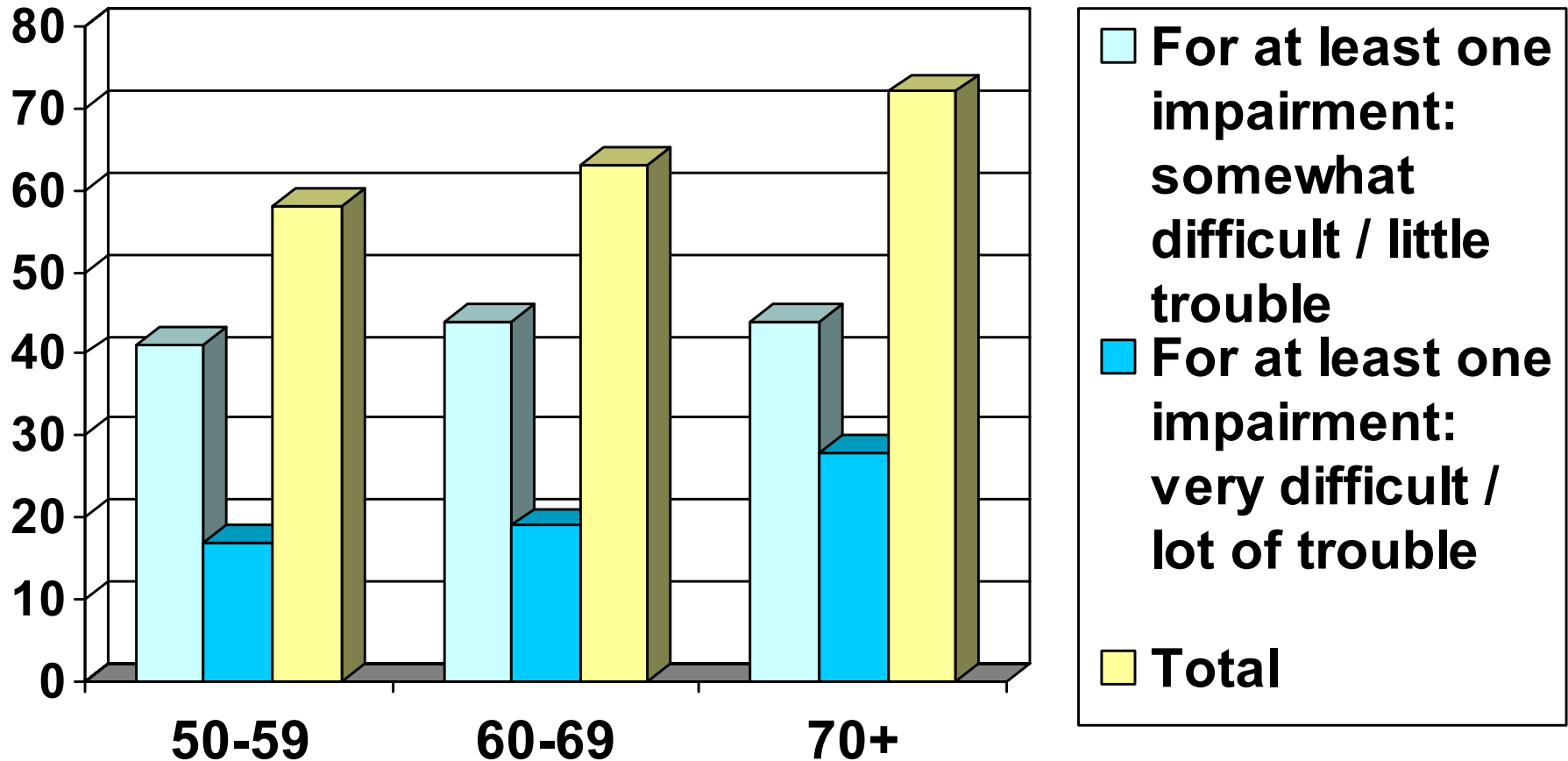
# IST involvement by age group



# Functional restrictions among the EU 50+ population

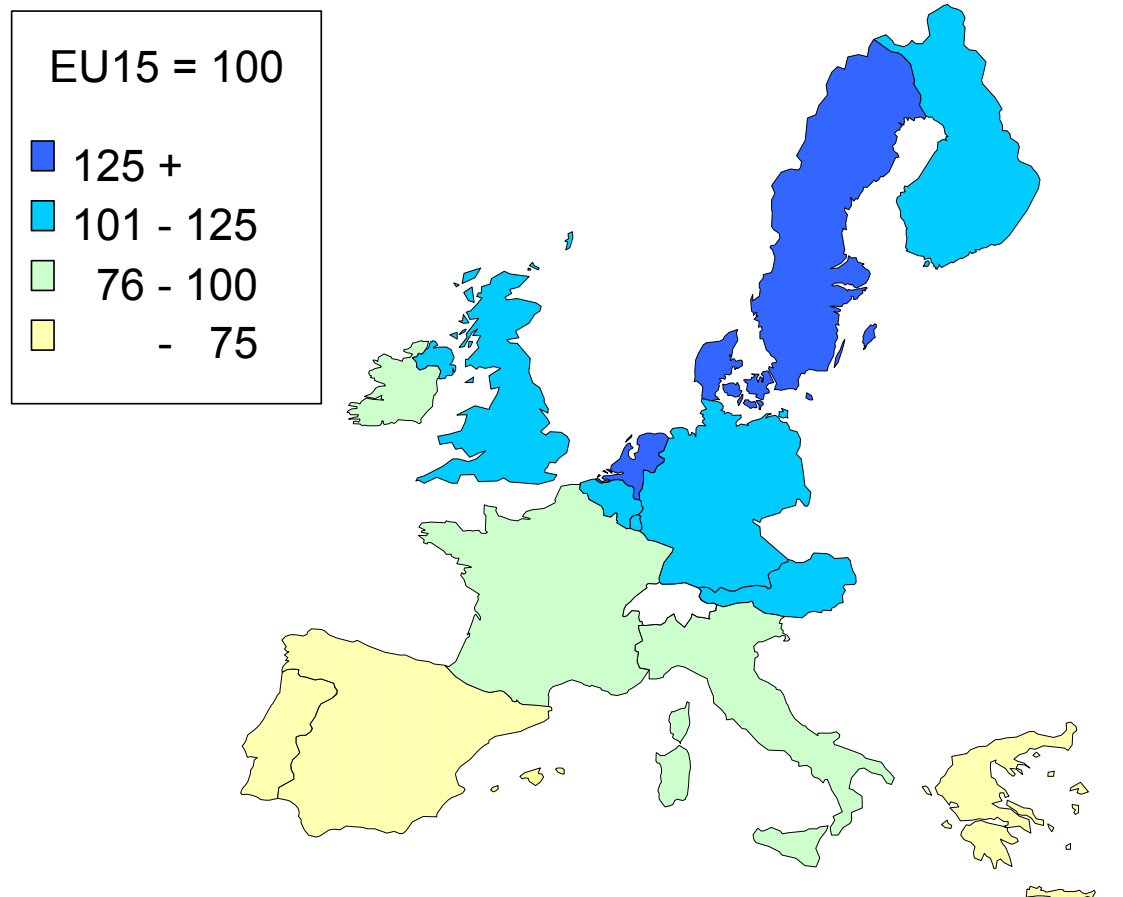


# Functional restrictions by age

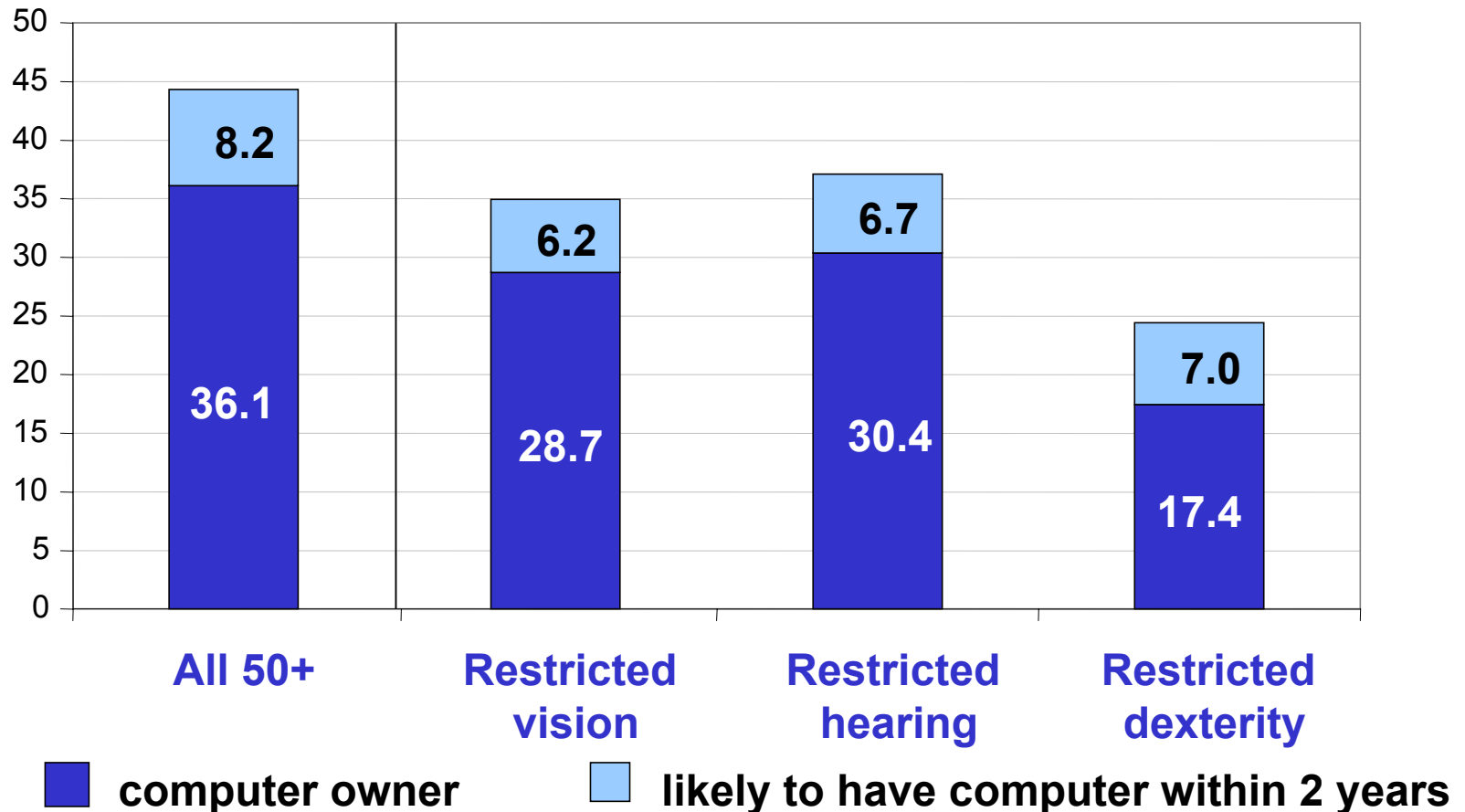


Base: all experienced frontrunners (N=2621)

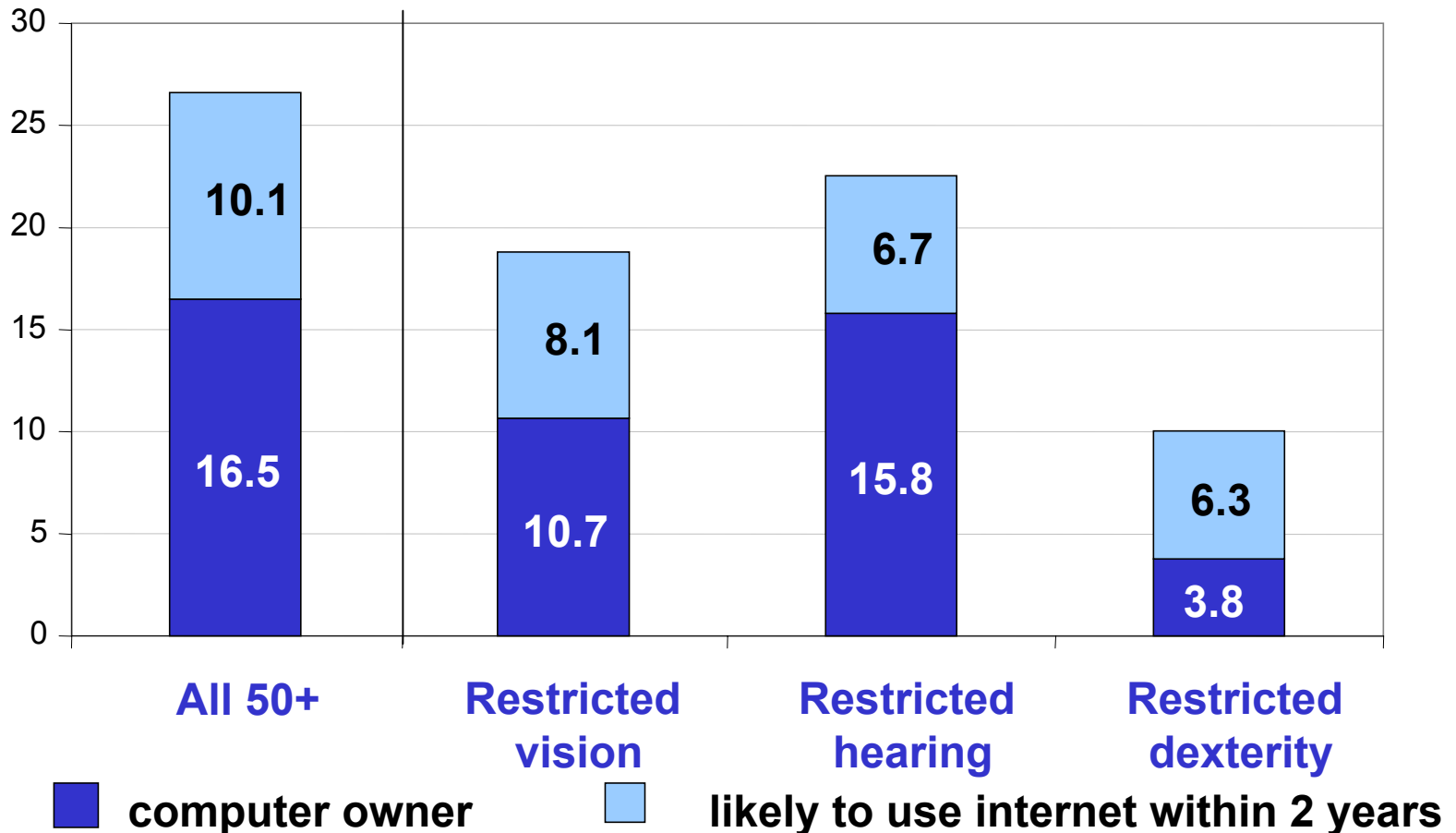
# Average no. of IST applications/devices used among the EU 50+ population (index)



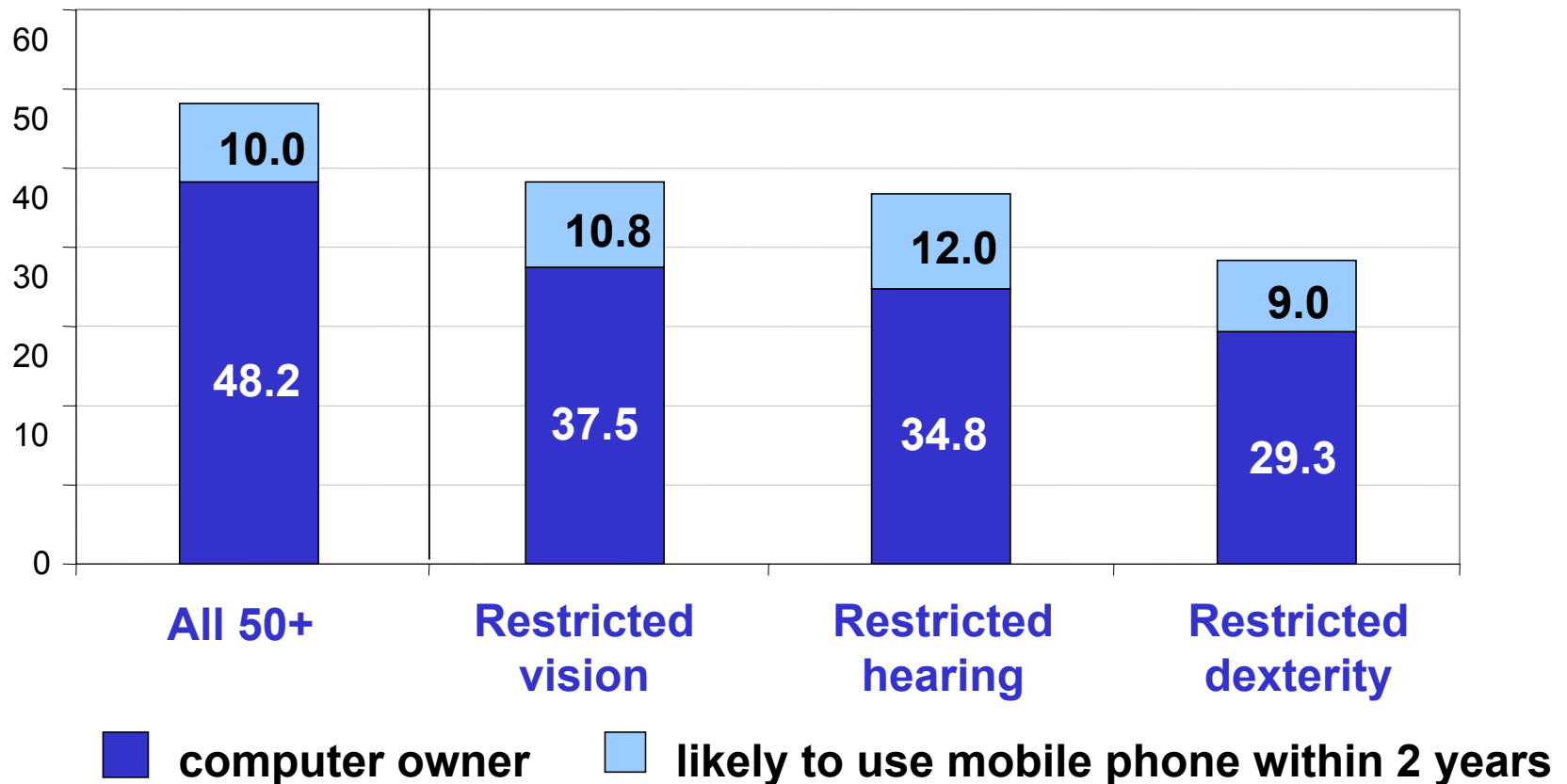
# Considerably restricted older Europeans (50+) and computer usage



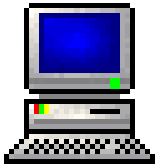
# Considerably restricted older Europeans (50+) and internet usage



# Considerably restricted older Europeans (50+) and mobile telephony



# Future demand for main stream IST



**10 m potential new customers (13% current non-users) within next two years of which over 6 m are functionally restricted**



**12 m potential new customers (14% of current non-users) within next two years of which nearly 8 m are functionally restricted**

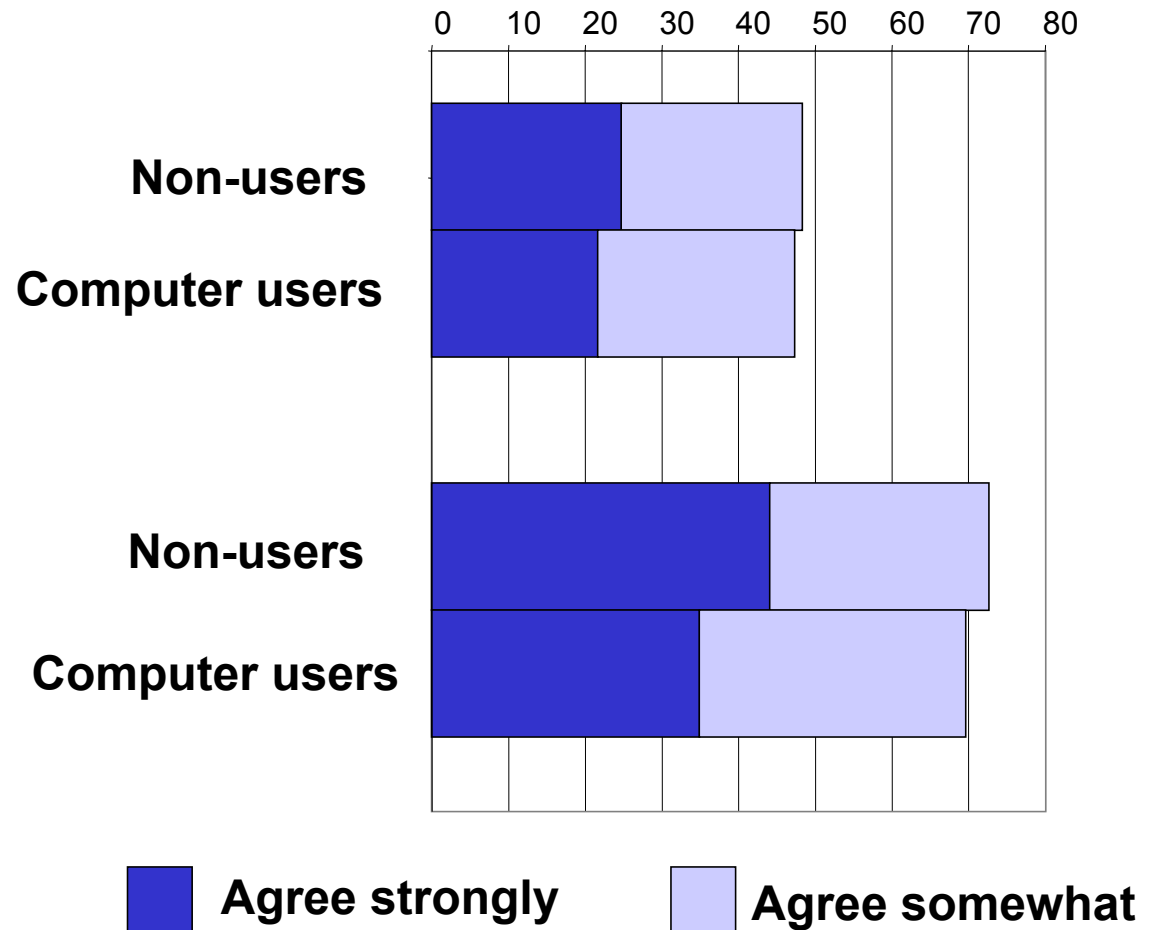


**12 m potential new customers (20% of current non-users) within next two years of which nearly 8 m are functionally restricted**

# Attitudes of older Europeans (50+)

“Manufacturers don't consider the interests of older people in adequate design”

“In the media, these technologies are always connected with young people”



# Conclusions

- large (and growing) market volume within the 50+ population presently not adequately addressed by manufacturers
- prevalence of functional restrictions (even within the younger cohorts) requires ubiquitous design-for-all solutions
- IST involvement not just a matter of age cohorts, the group of “want-nots” will not disappear by-and-by