



Attitudes, expectations and needs of older people for telehealth services and homecare:

Results from the European SeniorWatch surveys

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Research context - the overall project

- a market study about the specific Information Society Technology needs of older people
- funded by the EU under the Information Society Technology Programme (1998-2002)



- project consortium:



- subcontractors in Europe, USA and Japan

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Methodology

- **The user surveys were undertaken across all 15 European Union Member States, by computer-assisted telephone interviews - CATI. The *random samples* were geographically and socio-demographically stratified. The surveys were carried out in the summer of 2001.**
- **The *Older Population Survey* (OPS) is based on 9,661 respondents aged 50+ from all Member States. The data are weighted according to country size and are representative for the EU.**
- **The *Decision Maker Survey* (DMS) contacted 512 decision makers, randomly selected, from home care provider organisations in all Member States.**

Demography of OPS Respondents

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

Access to and usage of general purpose ICT applications

Access:

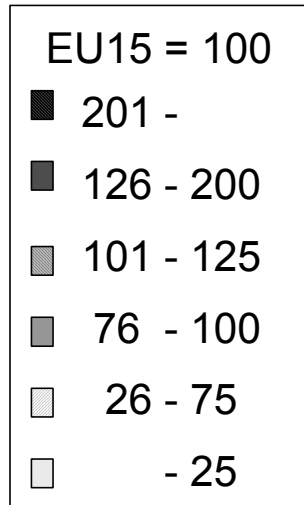
Standard TV.....	98%
Cable TV.....	30%
Digital TV.....	13%
Mobile Phone.....	48%
PC.....	36%
Notebook/Laptop.....	5%
Internet.....	22%

Usage:

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

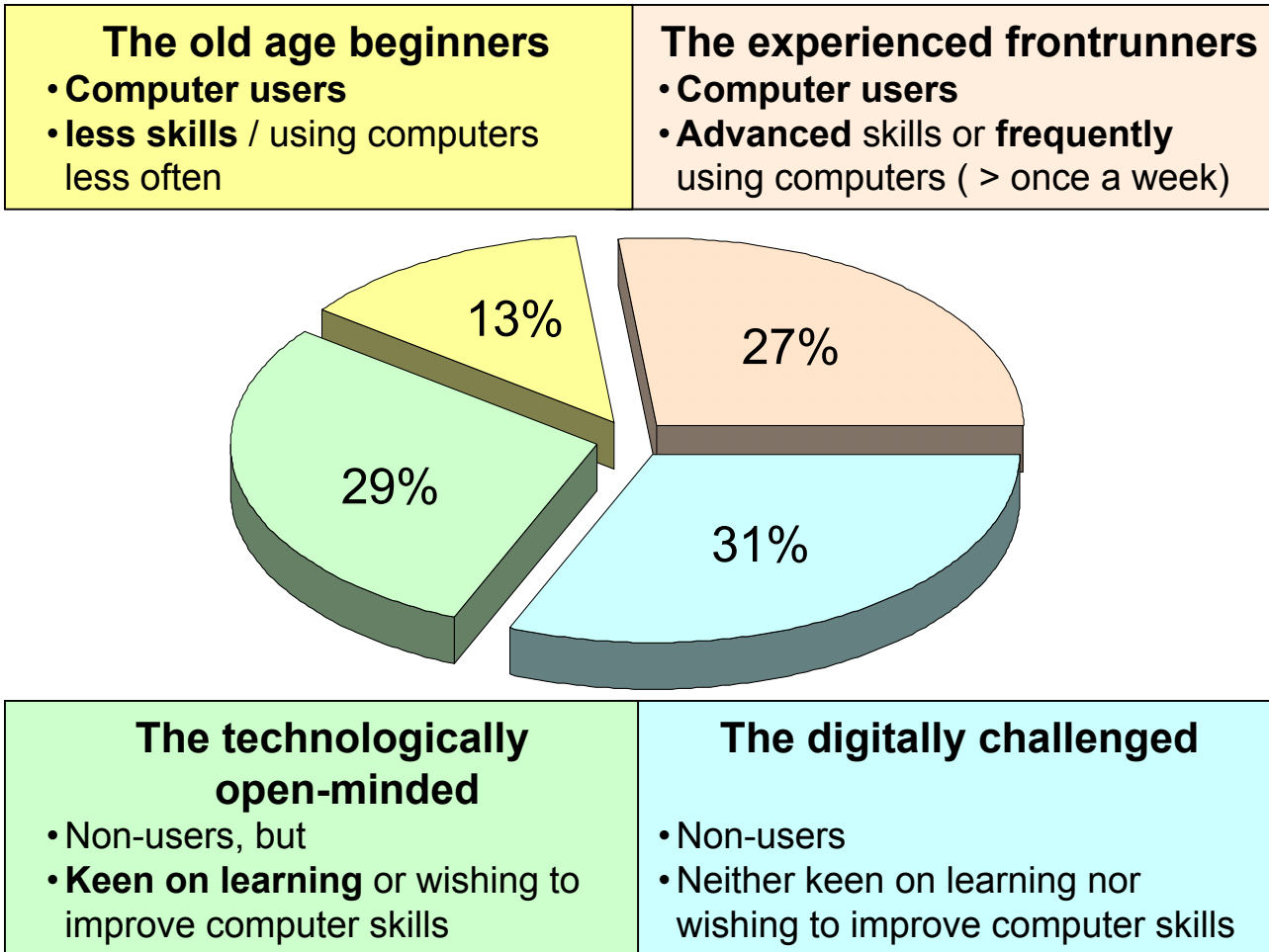
North South Gradient re internet usage

Regular internet users



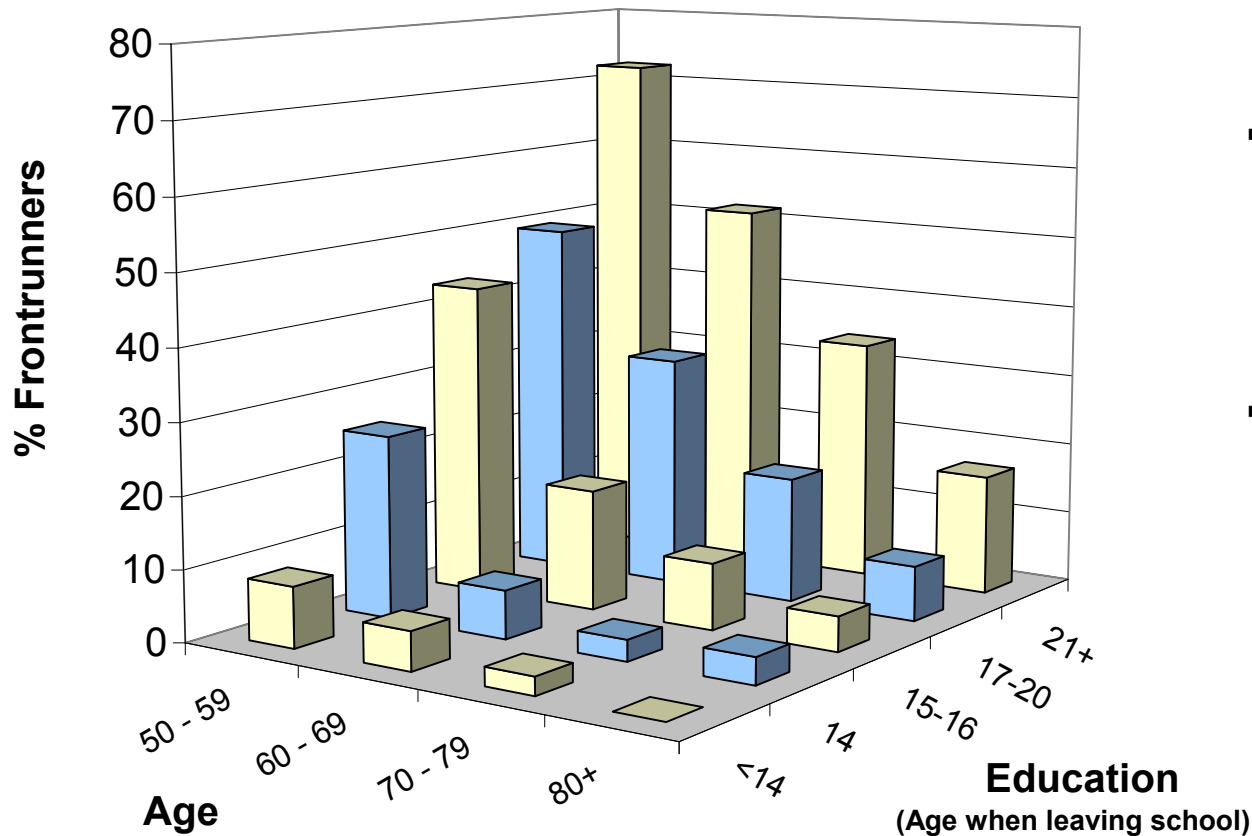
- shares of internet users among the European older population vary considerably across Europe
- there is a clear north-south gradient regarding regular internet usage

ICT involvement - Older population covers broad spectrum



- ICT involvement is a compound indicator which takes account of attitudes, skills and usage data
- Users are different as to their usage intensity, non-users differ re their openness to become involved.
- The older population covers the whole variety of ICT involvement
- About one third are heavily at risk of being left behind.

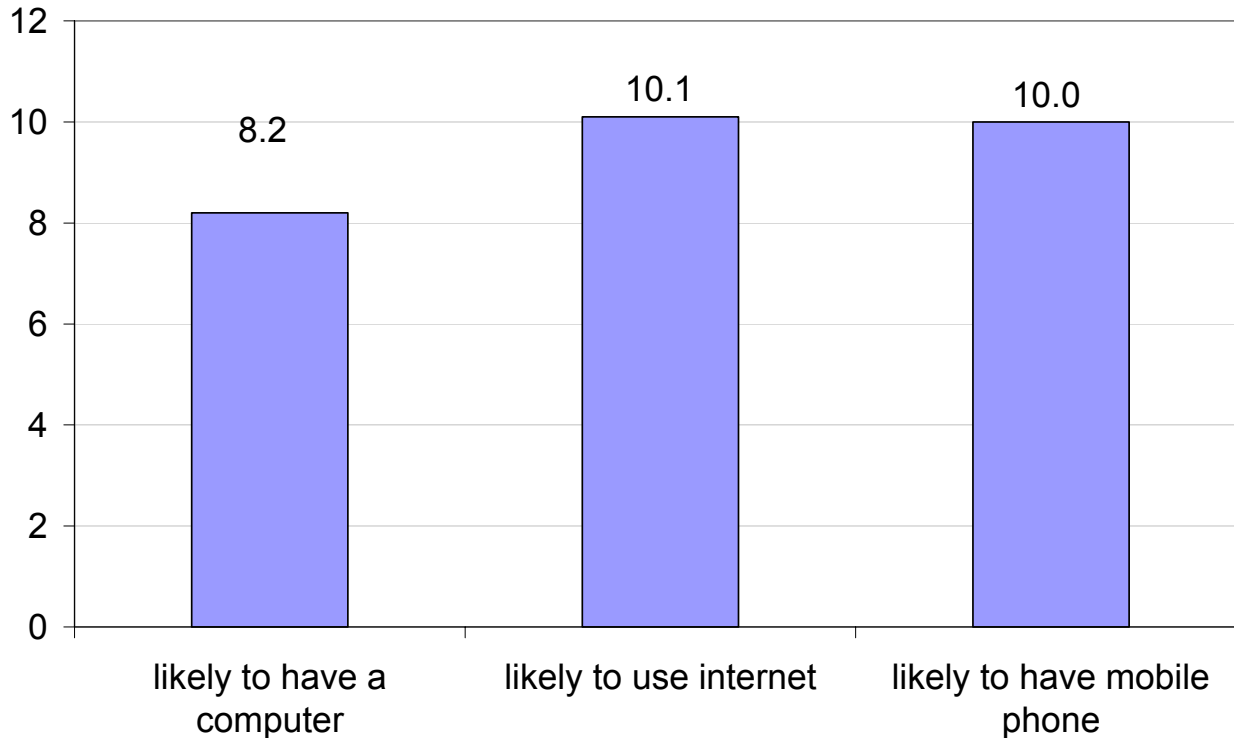
ICT involvement as a matter of age and education



- 72% of those aged 50-59 and 21+ years old when finishing their education (i.e. university degree and equivalent) are experienced frontrunners
- But none of those aged 80+ and leaving school <14 years old are experienced frontrunners.

Strong market growth - about 10 - 13 m new customers within 2 years

Plans to buy/use within the next one or two years
(as % of total older population)

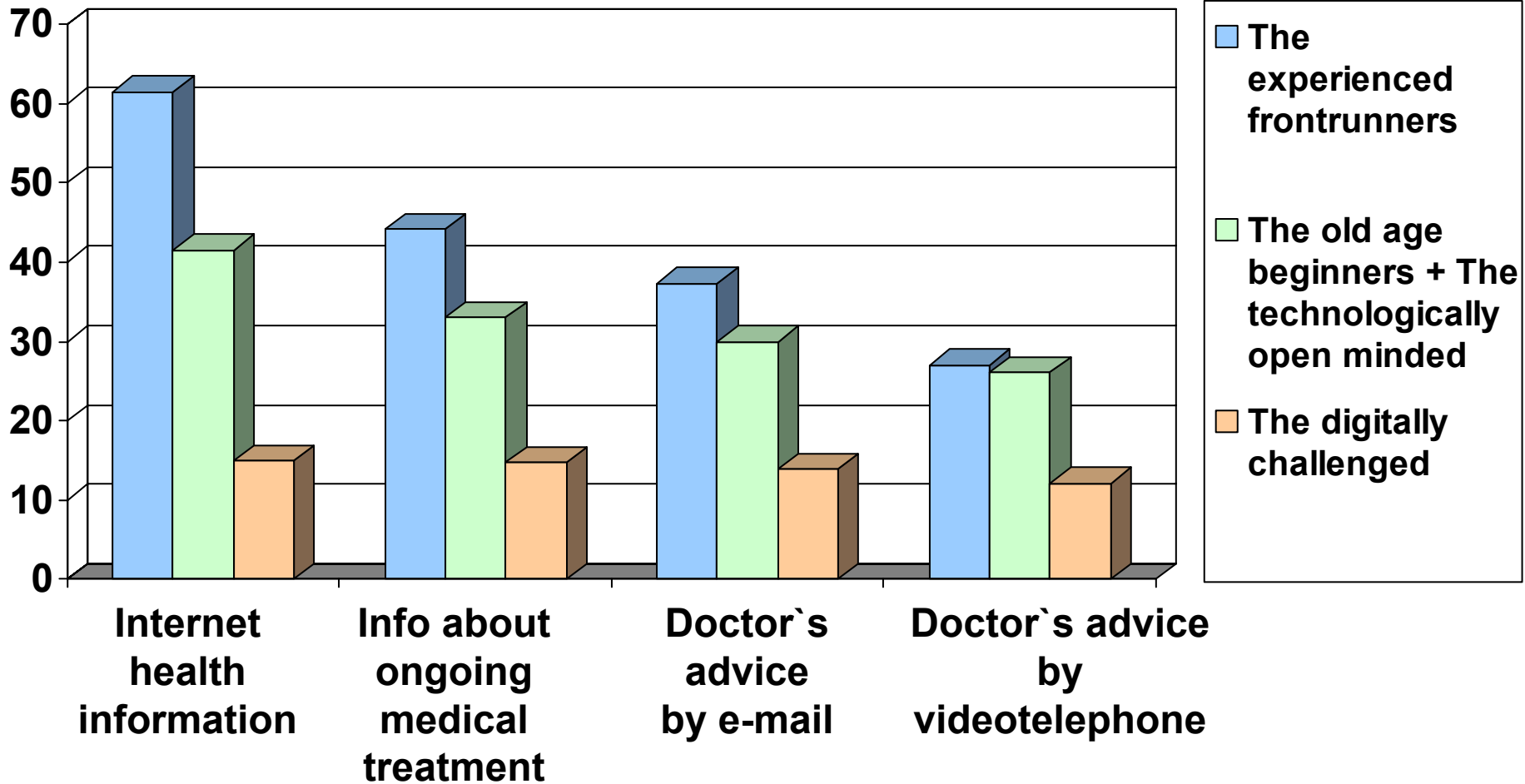


- Markets for computers, internet and mobile phones will grow by 10 to 13 m customers respectively by 2003.
- Of those likely to have a **computer**, 18% are suffering from a *severe restriction* as regards vision, hearing or dexterity (Only 32% report *no* restrictions at all).
- Also 16% of those likely to become **internet** users (38% no restrictions at all).
- And 22% of those likely to buy a **mobile phone** (36% no restrictions at all).

Interest in e-health applications (%) by age and computer literacy

	Interested in:	Health info on the Internet	Info re treatment on PC or TV screen	Doctor's advice by e-mail	Doctor's advice by video-telephone
Total		38	30	27	22
Age	50 - 59	52	39	33	27
	60 - 69	38	31	28	23
	70 - 79	25	20	19	16
	80+	15	18	14	13

Interest in e-Health applications



Use of conventional health devices (%) by age

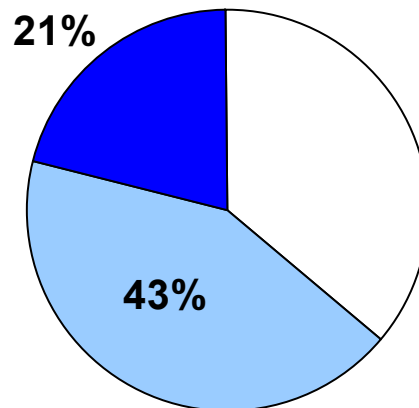
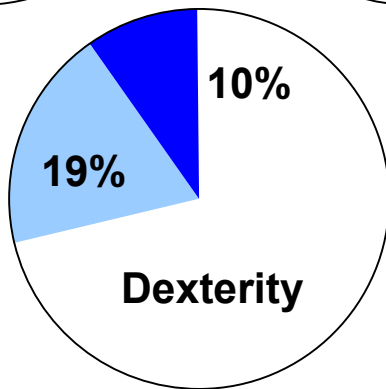
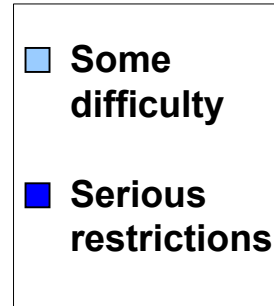
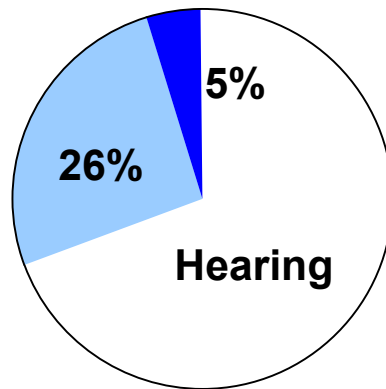
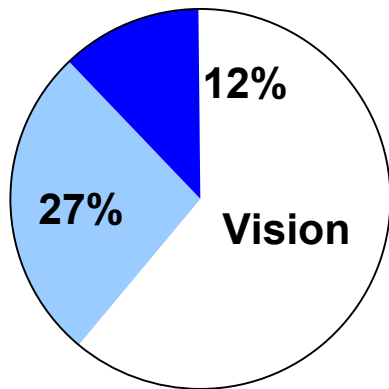
Measurement device		Age				Total
Type	usage	50 - 59	60 - 69	70 - 79	80+	
blood pressure	regularly	13	15	19	15	15
	sometimes	23	22	19	19	21
	<i>All</i>	36	37	38	34	36
scales	regularly	39	38	37	28	37
	sometimes	37	37	39	36	37
	<i>All</i>	76	75	76	64	74

Prevalence of chronic diseases in EU 2001

Disease \ Age	Prevalence in %				
	Total	50-59	60-69	70-79	80 +
High blood pressure	33.7	23.1	34.8	44.9	41.7
Heart disease	16.8	7.4	14.5	27.4	35.7
Chronic respiratory disease	8.5	5.4	8.8	11.5	11.4
Diabetes mellitus	9.2	6.8	9.4	12.2	10.1
Joint/bone/muscle diseases	25.6	18.9	27.0	30.3	35.2
Other long term condition	18.7	16.7	18.5	20.9	22.2
At least one chronic disease	62.0	49.0	64.2	73.4	74.0

Functional restrictions - a challenge for user-friendly and assistive technologies

Prevalence of functional restrictions as % of older population

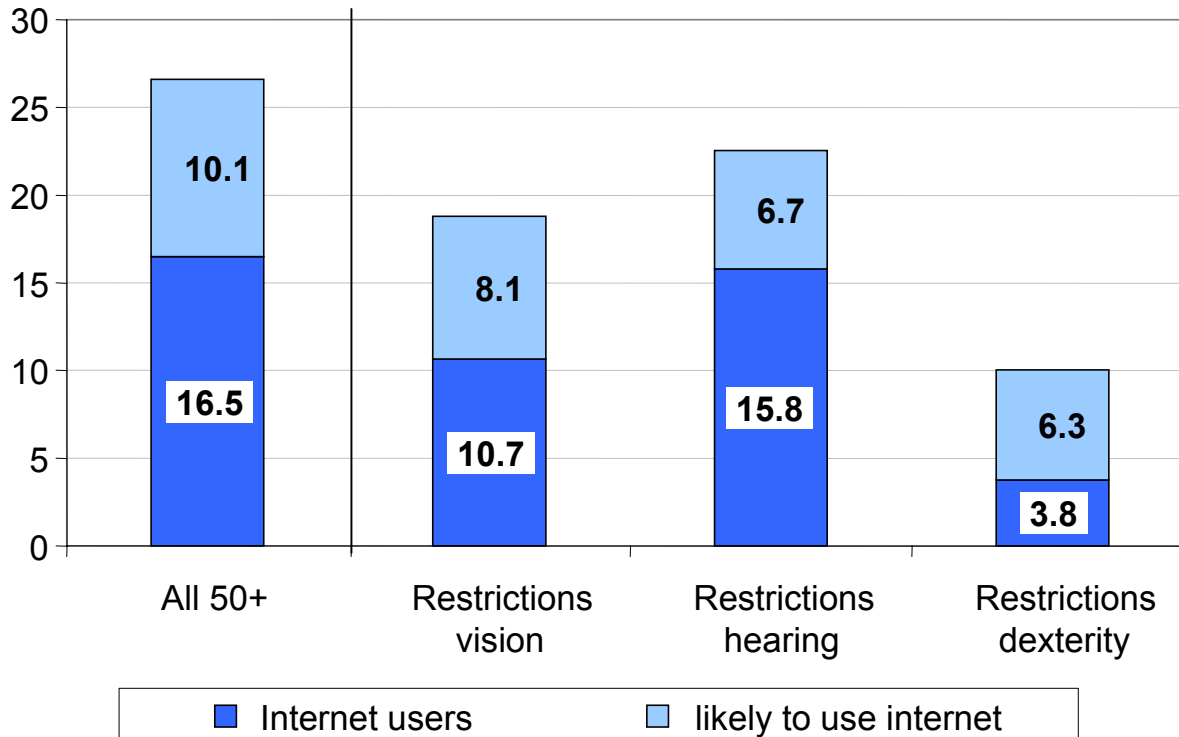


Either restrictions

- Functional restrictions often hinder full scale IST uptake
- Vision restrictions are most prevalent
- 21 % suffer from either severe vision, hearing or tactile restrictions
- 64 % suffer from either severe or light vision, hearing or tactile restrictions

Internet demand and market growth among people with functional restrictions

Use of and plans to use internet within the next one or two years
(as % of total older population)



- The Internet market is heading for a *60 % growth* within 2 years amongst older people with functional disabilities.
- The relative majority will be people with *hearing* restrictions.
- Therefore particularly vision and dexterity disabilities need attention by design-for-all developments and internet services.

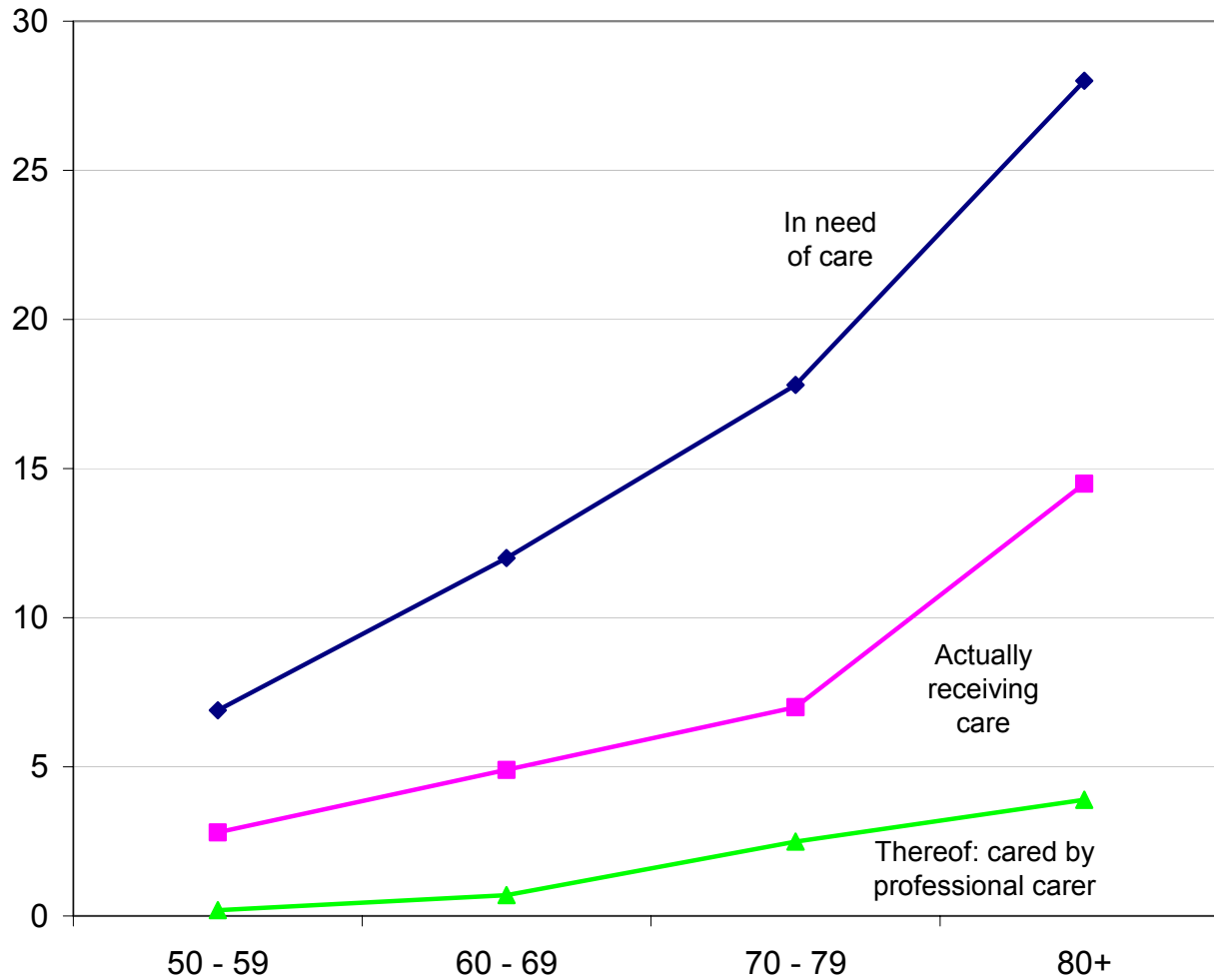
Market opportunities for tele-medical services

	Chronically ill citizens		All 50+ citizens
	percent [%]	absolute [million]	percent [%]
The experienced frontrunners	22%	17 m	31%
Old age beginners + technologically open minded	43%	32 m	42%
The digitally challenged	35%	26 m	27%

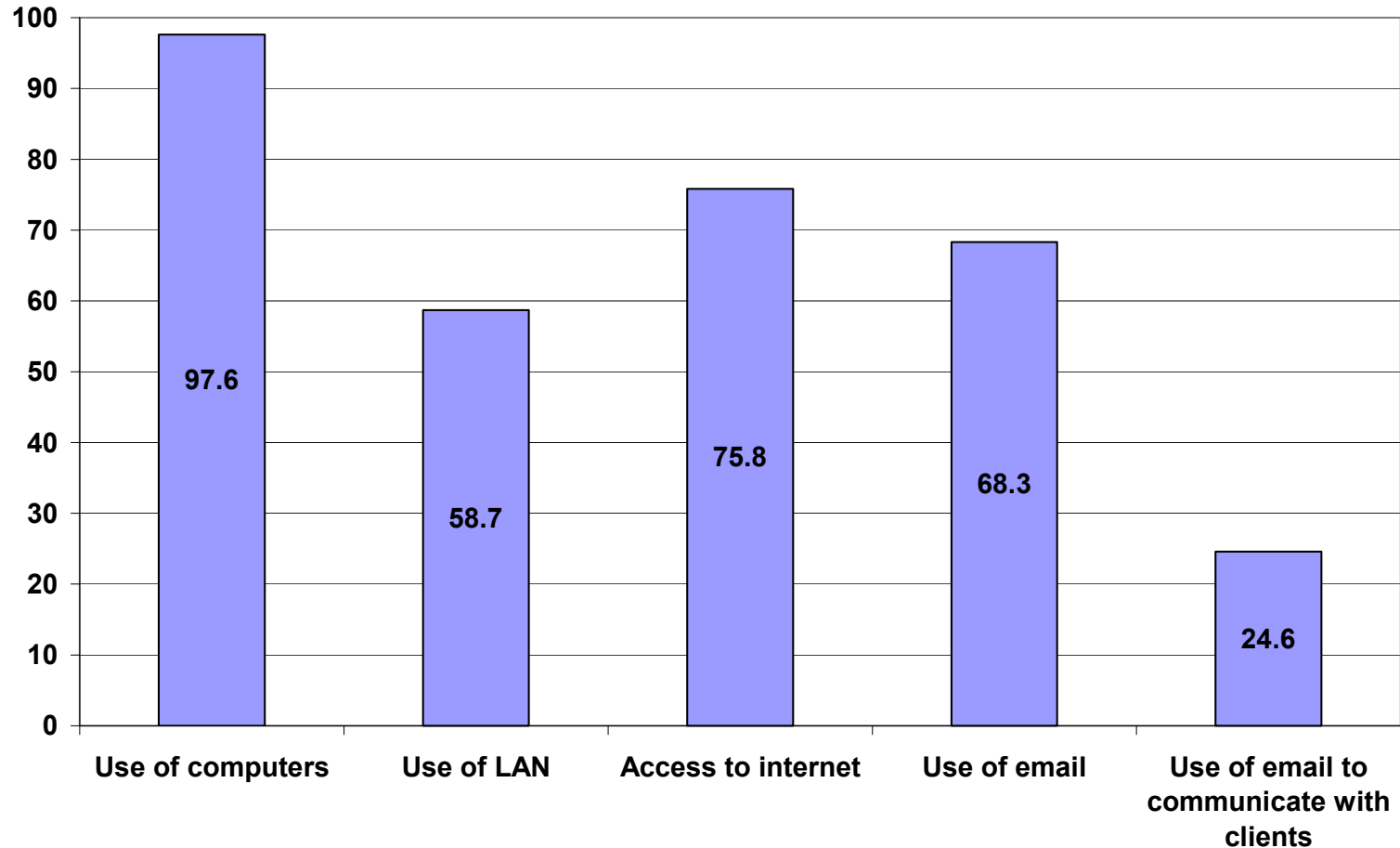
The growing importance of (tele-)home care services in Europe

- **Rapidly growing number of frail older people in need of care while the number of family carers diminishes**
- **Home care is the most prevalent form of care service delivery to older people in Europe (only about 5% live in institutional settings)**
- **All European Union Member States pursue a policy which explicitly prefers home care to institutional care**
- **Some countries have implemented a moratorium with regard to building new institutional homes**
- **IST products and services help to meet these economic and societal challenges**

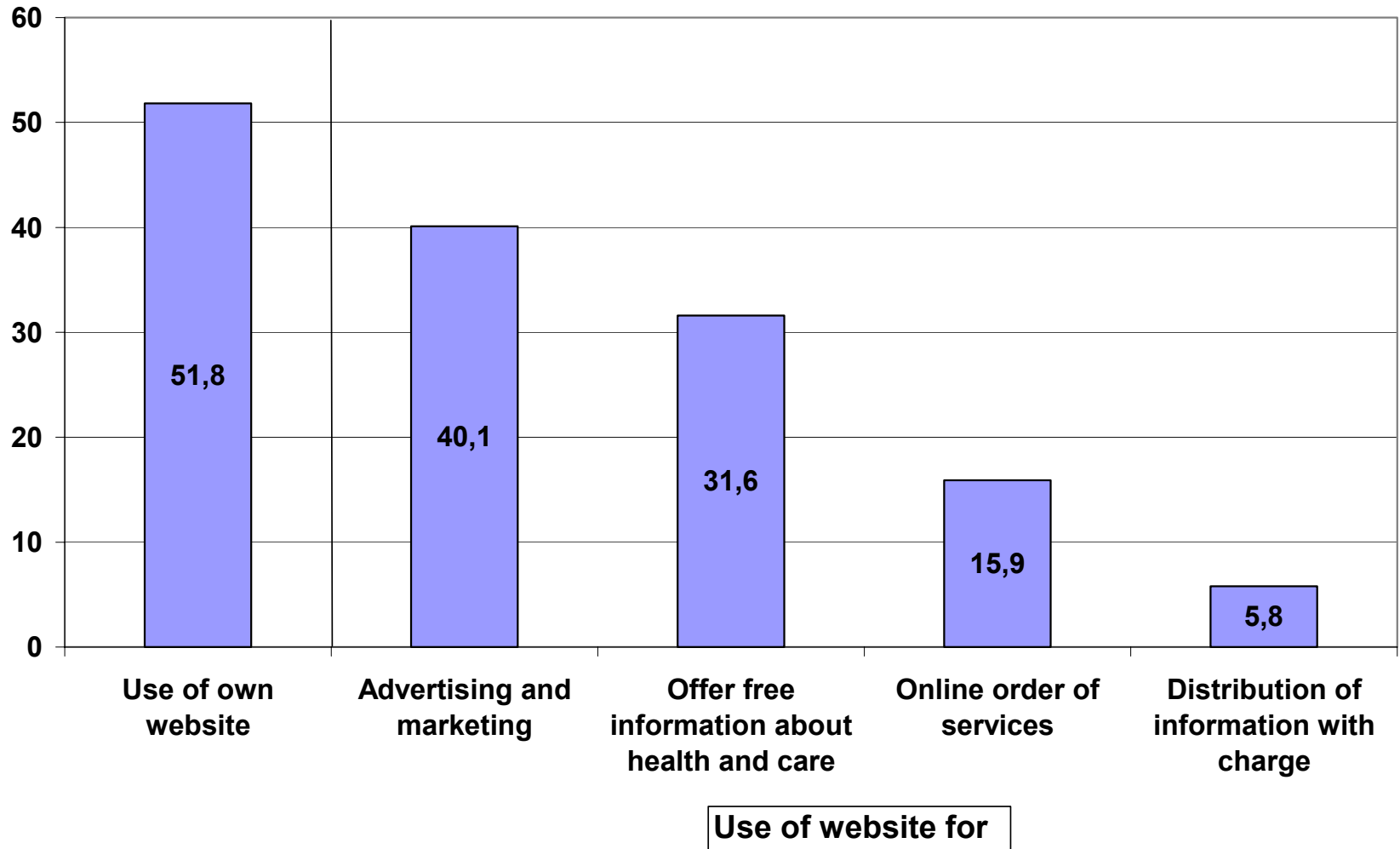
Percentage of older people in need of care services, 2001



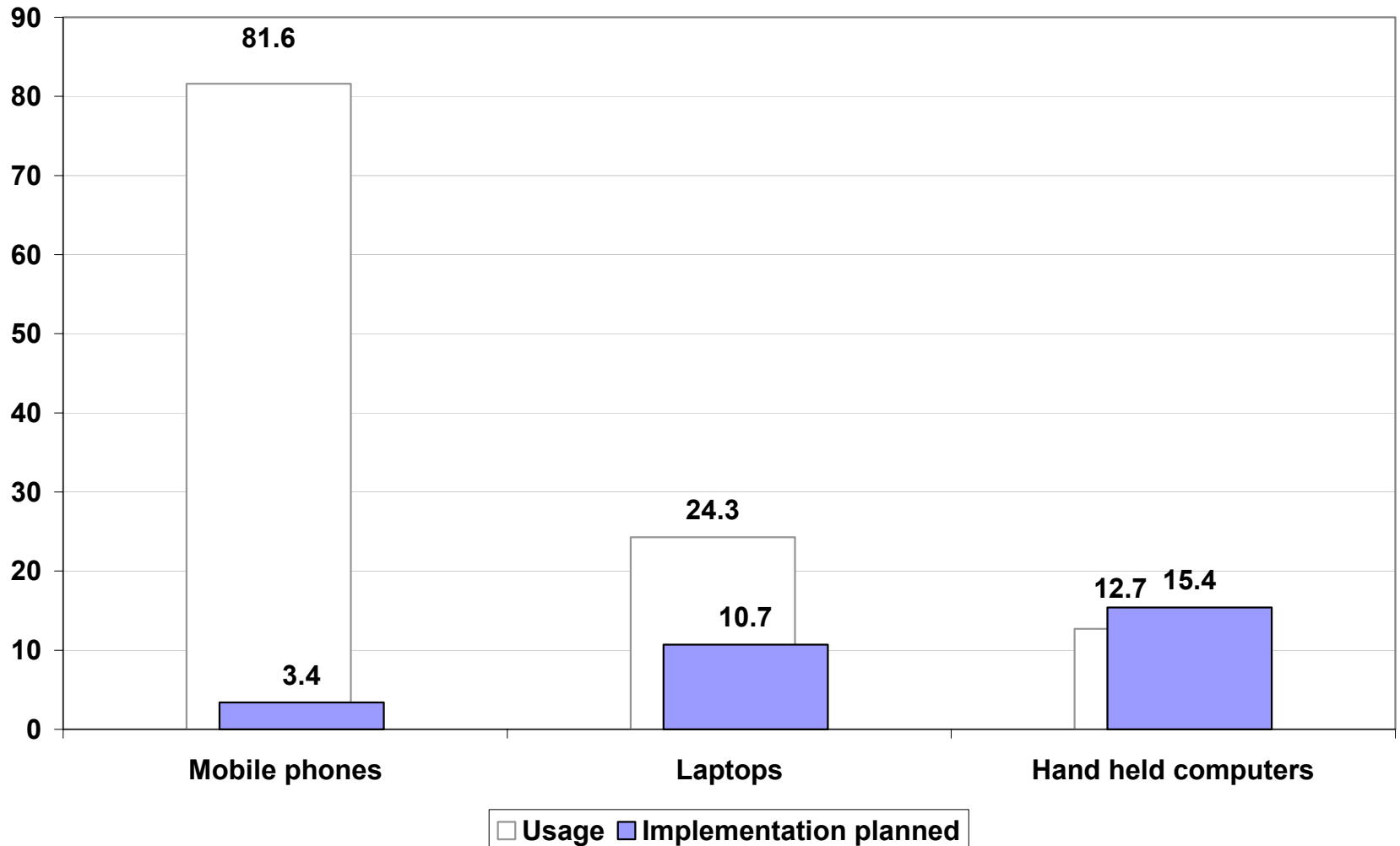
Home Care services - IST applications and trends: Usage (%) of basic IST applications in European care establishments, 2001



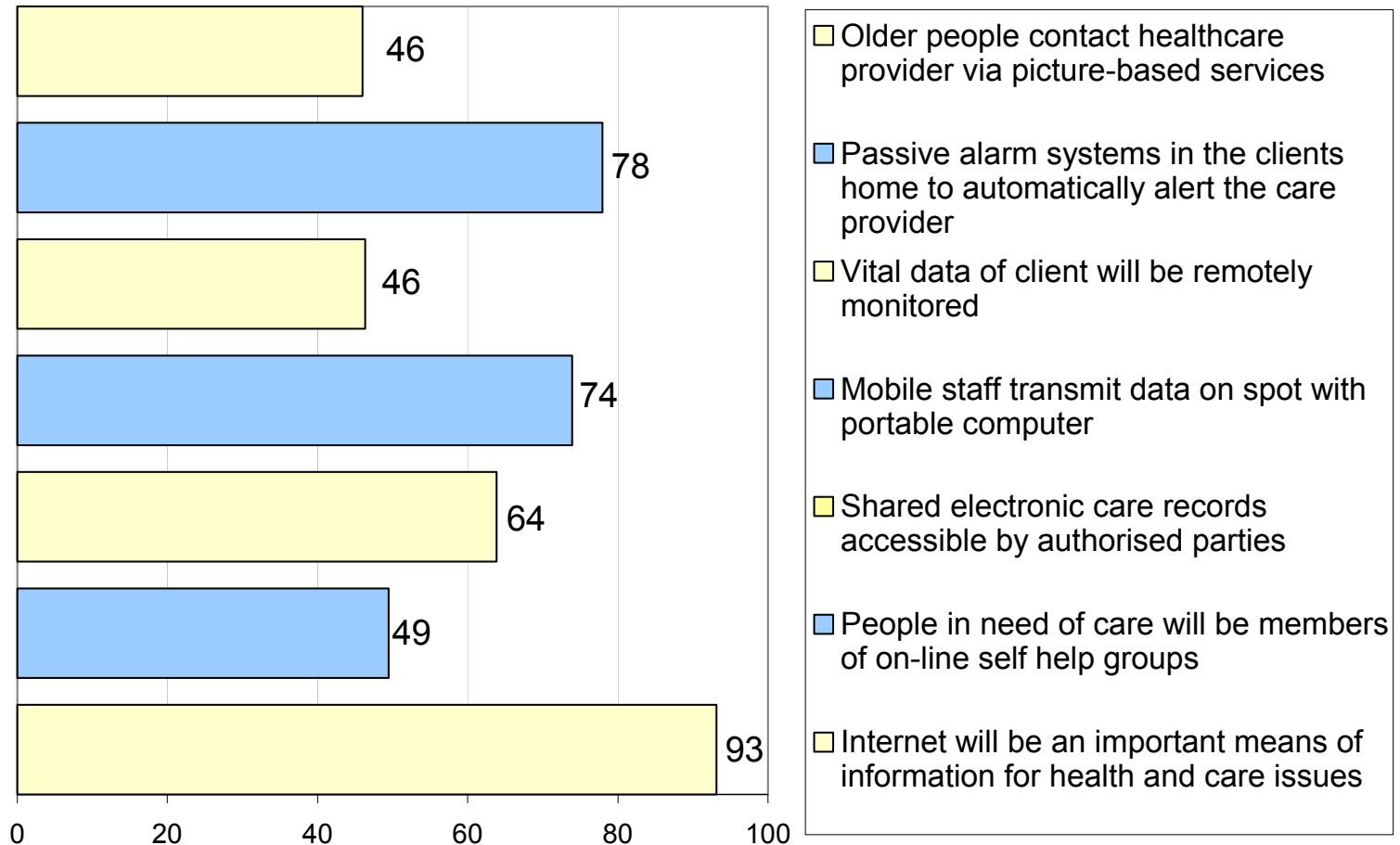
Marketing and services (%) provided on website, 2001



Planned implementation of mobile staff equipment



Assessment of future trends by home care services decision makers (in %), 2001



Conclusions - Older people

- 40% of the European population of 50+ age (49 m people!) are computer users, 27% have advanced skills and use a PC at least once a week - a vast market for e-Health applications and services
- The market will grow substantially as those presently still in work (50 to 60/65 years old) retire
- Access media like TV sets, (mobile) phones or services like Teletext need to be explored
- User interfaces must allow access for people with various disabilities
- Policy measures need to be taken to avoid a "Medical Divide"

Conclusions - Care services

- Home care service organisations have recognised - at the management level - the potential of IST applications and services
- It leads to improved services, streamlined delivery processes, reduced costs, competitive advantage
- The market potential is considerable, and the market volume will grow rapidly
- Major barriers within care service provider organisations are:
 - considerable lack of intra-organisational knowledge amongst staff
 - missing IST skills
 - too little training
 - investment costs
- Benefit/cost validation studies to convince both policy makers and investors are needed

Thank you very much!

Fore more information, visit

www.seniorwatch.de

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