Preliminary findings from the SeniorWatch project

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The project in a nutshell

- a market study about the specific Information Society Technology needs of older people
- funded within the Information Society Technology Programme (1998-2002)
- information gathering through EU-wide surveys, country reports, case studies, technology watch
- analyses of EU situation and trends, global perspectives, facilitators and constraints, strategic recommendations

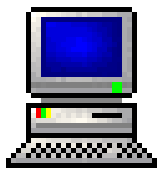
Market opportunities

- 40% of the EU 50+ population have ever used a PC, i.e. overall 49 m people with hands-on experience (20% of those who are in their 70ies and 10% of the 80+)
- 61 % have used or are interested in Internet applications: overall 74 m potential customers for online services

but independent whether user or non-user

- about 50% (59 m) see their interests in adequate design not being considered by IST manufacturers
- more than 70% (88 m) perceive these technologies as being nearly always connected with young people in the media

Future demand for mainstream IST



13% of those who have no computer at home are likely to have one within the next one or two years; i.e. 10 m potential new customers (of which over 6 m are functionally restricted)

14% of those who have never used the Internet are likely to use it within the next one or two years, i.e. 12 m potential new customers (of which nearly 8 m are functionally restricted)

20% of those who have no mobile phone are likely to have one within the next one or two years; i.e. 12 m potential new customers (of which nearly 8 m are functionally restricted)

Societal challenges

- IST involvement is related to socio-demographic variables (education/social status,income, age) but also to life style and functional restrictions
- 31% (38 m) of the EU 50+ population belong to the “want-nots” (even 18% in the age range between 50 and 60)
- 21% (26 m) are considerably functionally restricted in using IST (even in the age range between 50 and 60 years 17%)
- clear north/south gradient regarding IST involvement (e.g. 6.1 devices/applications are used on average in Sweden and 2.8 in Greece)

Care challenges

- IST is widely used by care providers but mostly in an administrative context (e.g. PC: 97%, web site: 52%, mobile phone: 82%)
- service providers see considerable potential of IST (e.g. better quality of service: 74%, extension of current service: 69%, more independent clients: 68%)

but

- 84% anticipate non-acceptance of IST among clients
- 70% have poor intra-organisational knowledge about IST
- 54% do not equip their staff with mobile devices due to costs

Technology challenges

- IST intelligence becomes integrated into networked devices supporting all activities of daily living (ubiquitous networked computer intelligence)
- networked intelligence accessible and usable by a variety of users and in various usage contexts (application adjustable to context and diversity of use)
- access to general purpose applications (e.g. eBusiness), eHealth and eCare via devices/services widely in use like TV, Teletext, cable/digital TV, telephone/mobile phones/voice access
- software/user interface adjustable to skill level and experience of user

Some conclusions I

- 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
- the problem of individualisation and adaptability of IST becomes increasingly relevant for the population at large as usage contexts diversify (e.g. accessing the Internet while driving a car)

Some conclusions II

- IST involvement not just a matter of age cohorts, the group of "want-nots" will not disappear
- potential of IST for care services generally recognised at management level, but major barriers are: lack of intra-organisational knowledge, IST skills and cost/benefit validation
- "older people and IT" is a policy issue in the Member States but concrete measures initiated seem to be not guided by a comprehensive strategy

Open questions

- how to convince IST manufacturers to better address the market (e.g. market surveys, legislation/regulation, standardisation) ?
- how to cater for a broad range of usage contexts/user requirements at application/device level (e.g. technologies, design concepts/tools, needs/requirement analysis) ?
- how to prevent a “digital divide” in an IST-based every-day environment (e.g. regulation, demonstration, awareness, skills, incentives) ?