

Older Citizens (50+) and European markets for ICT products and services

Representative data from the SeniorWatch user surveys

Chart Report

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The user surveys

- across all 15 European Union Member States
- computer-assisted telephone interviews - CATI
- geographically and socio-demographically stratified random sampling
- summer of 2001
- Older Population Survey (OPS) 9,661 respondents aged 50+
- Decision Maker Survey (DMS): 512 decision makers from home care provider organisations

Market opportunities

Access to and usage of general purpose ICT applications

Access:

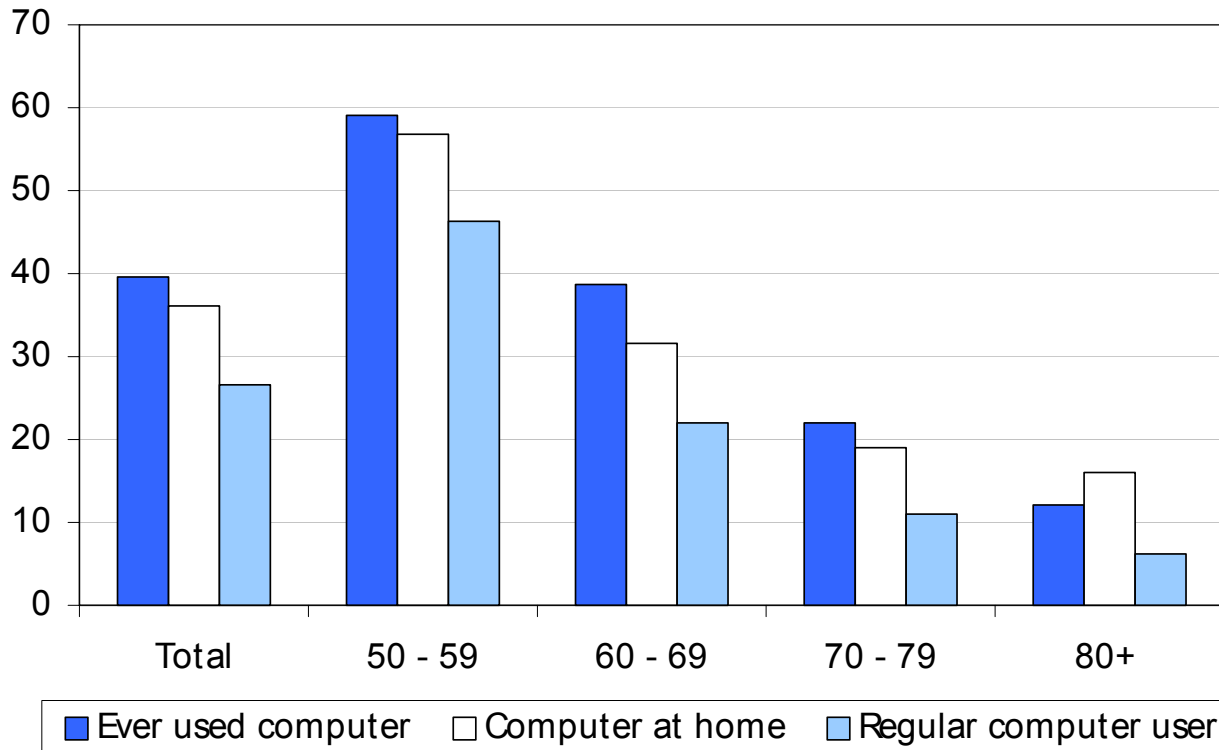
Standard TV.....	98%
Cable TV.....	30%
Digital TV.....	13%
Mobile Phone.....	48%
Computer.....	36%
Notebook/Laptop.....	5%
Internet.....	22%

Usage:

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

Computers - quite common in seniors' homes

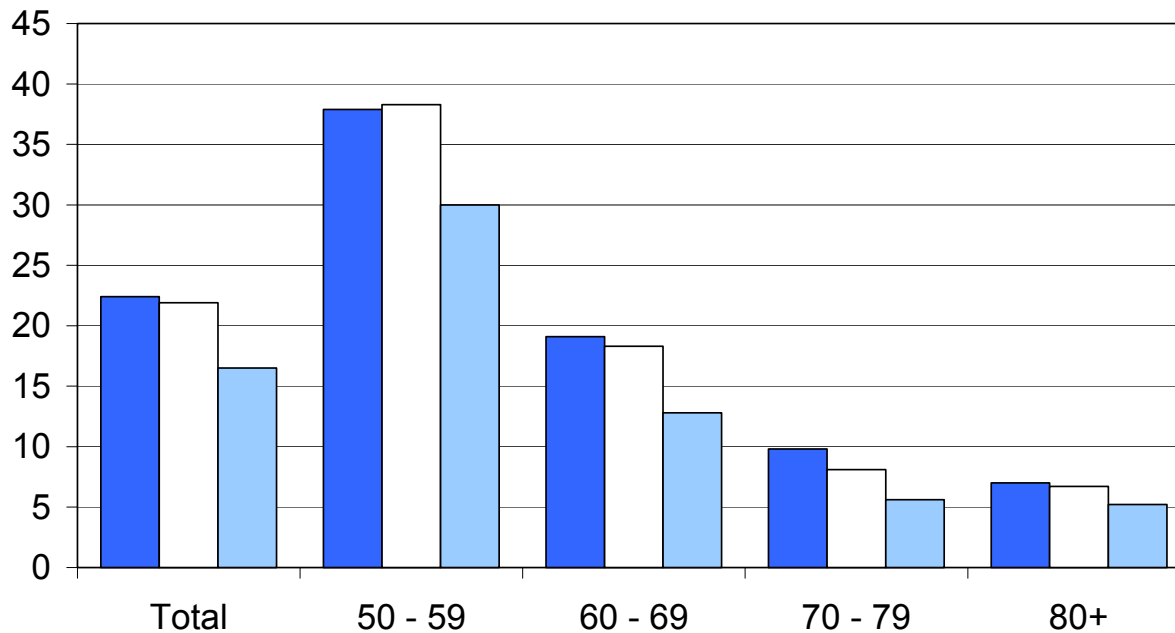
Computer access and usage by age
(as % of total)



- 44 m (one out of three) older people can access to a computer at home
- One fourth (33 m people) are regular computer users
- Computer involvement decreases with age
- However, cohort effects more plausible than life-cycle effects

Internet access and usage - European seniors entering the web

Internet access and usage by age
(as % of total)

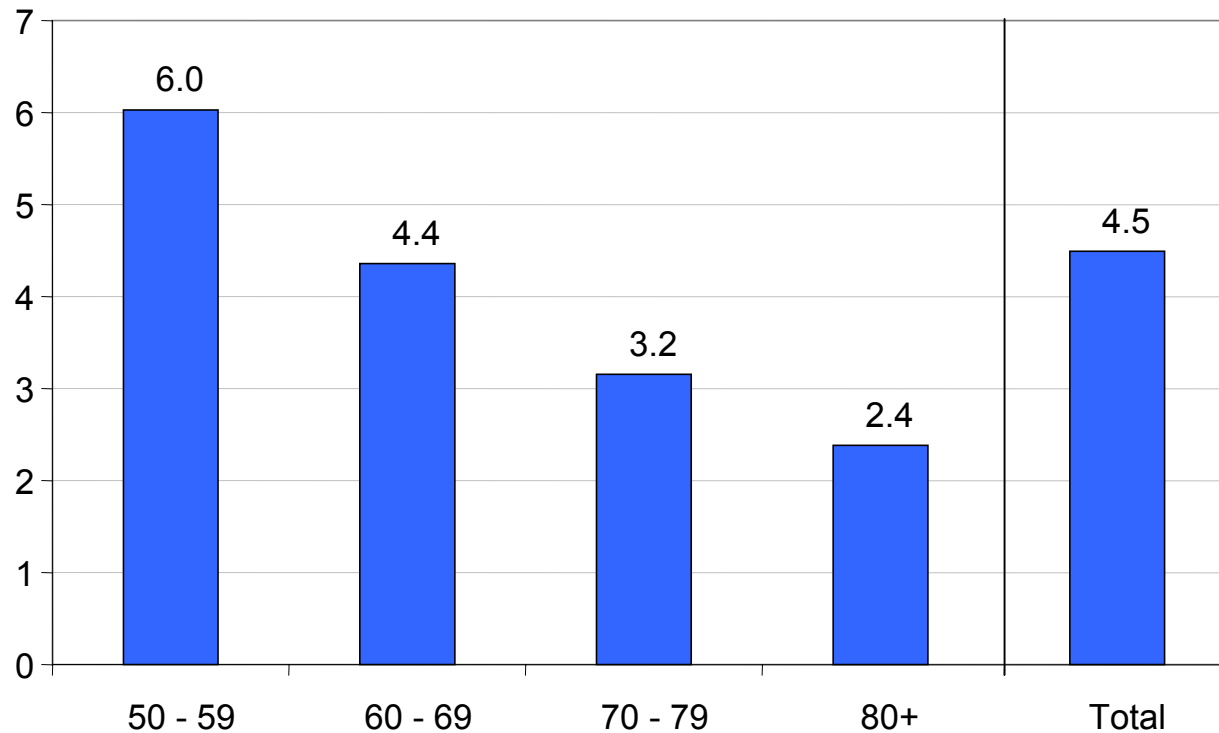


- Internet has only begun to enter the senior market
- 16% of the 50+ population are frequently using the internet
- Usage is strongly concentrated in the 50-59 cohort
- For the old aged - esp. 70+ - internet usage is still very low

■ Internet access at home □ Ever used the Internet ■ Frequent internet user

ICT usage by age

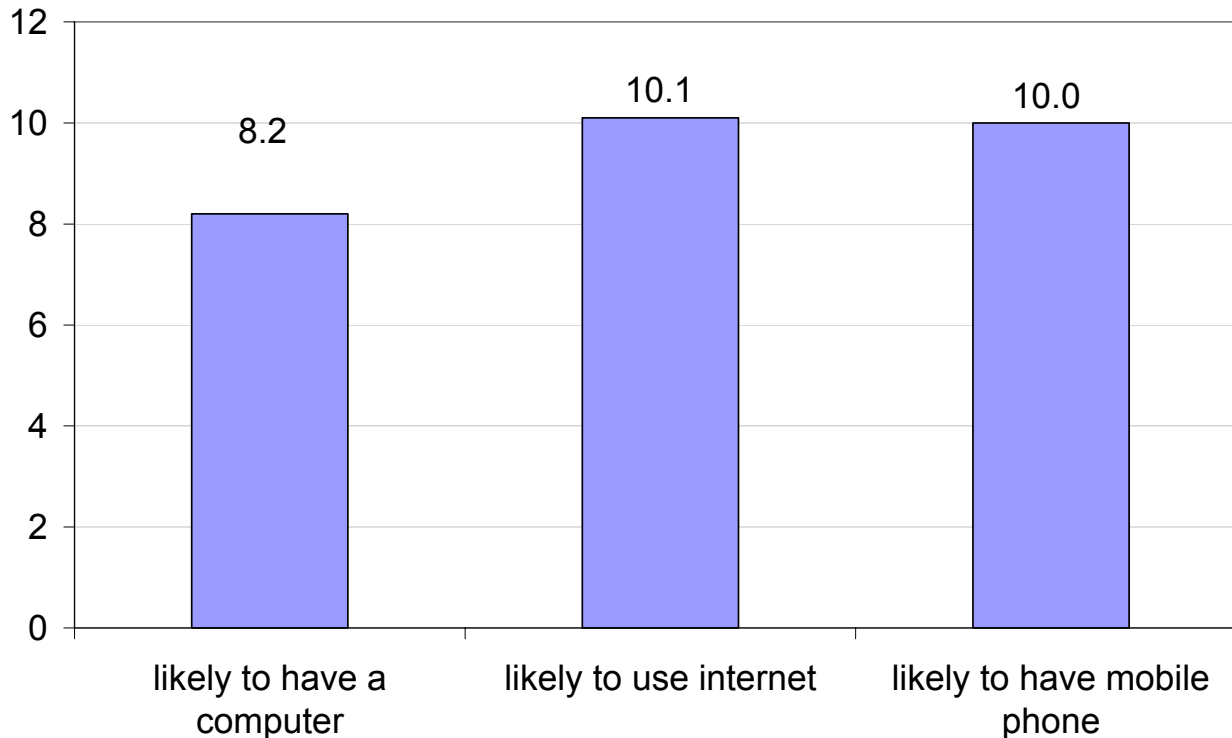
Average number of ICT products and services used
(out of 14 items)



- The average number of ICT products accessible and/or used, e.g. TV, DVD, fax, computers and the internet (maximum total of 14) is also closely related to age

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

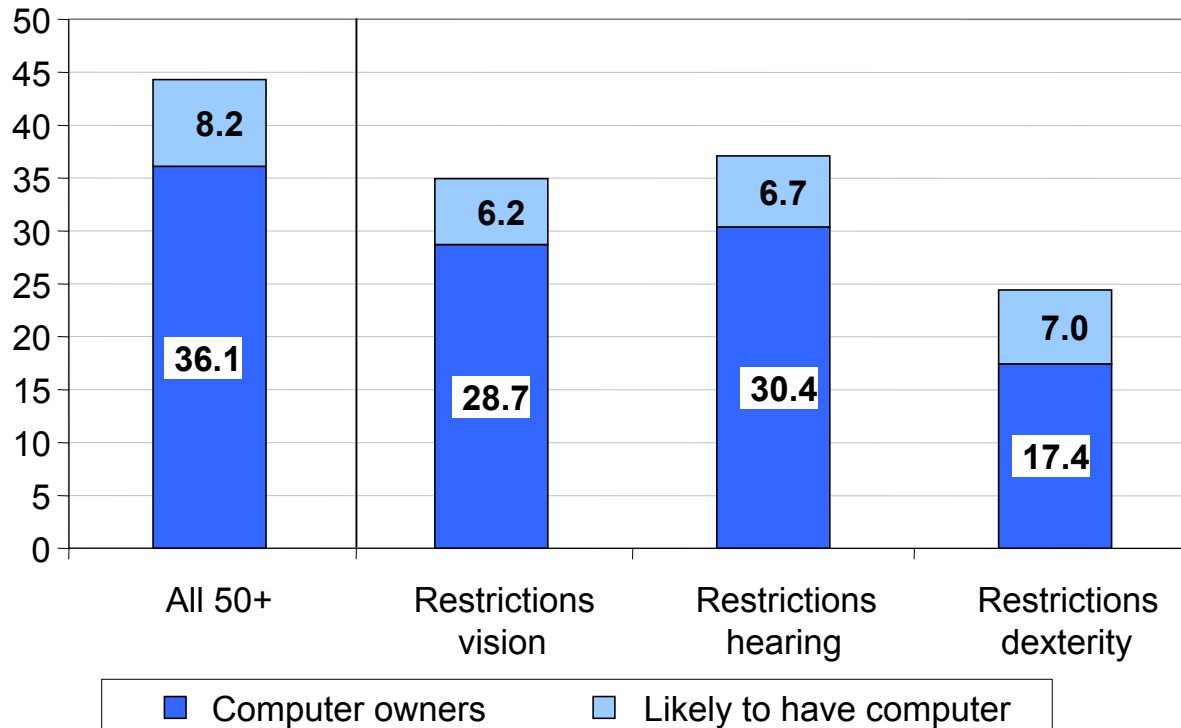
Plans to use within the next one or two years
(as % of total older population)



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

Computer demand and market growth among people with functional restrictions

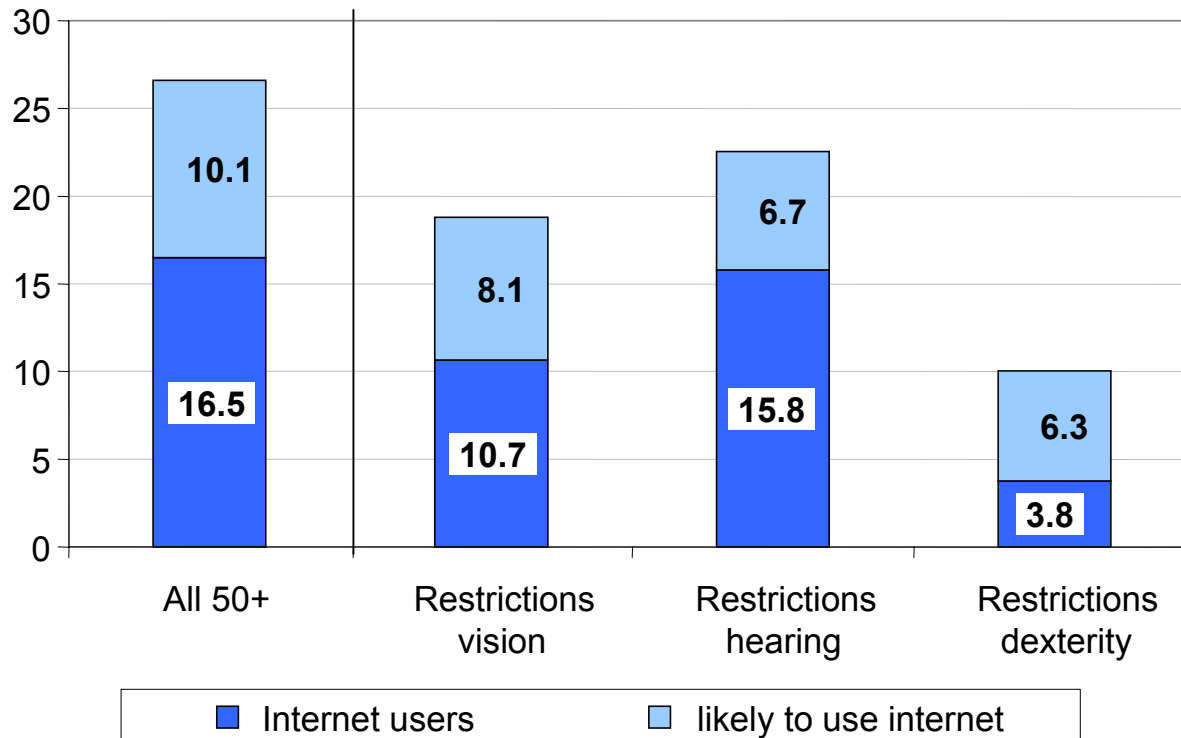
Ownership of and plans to purchase computers within the next one or two years
(as % of total older population)



- The market for computer sales to older citizens will grow by about 22% in 2 years
- User friendliness must be improved: particularly dexterity disabilities restrict computer access

Internet demand and market growth among people with functional restrictions

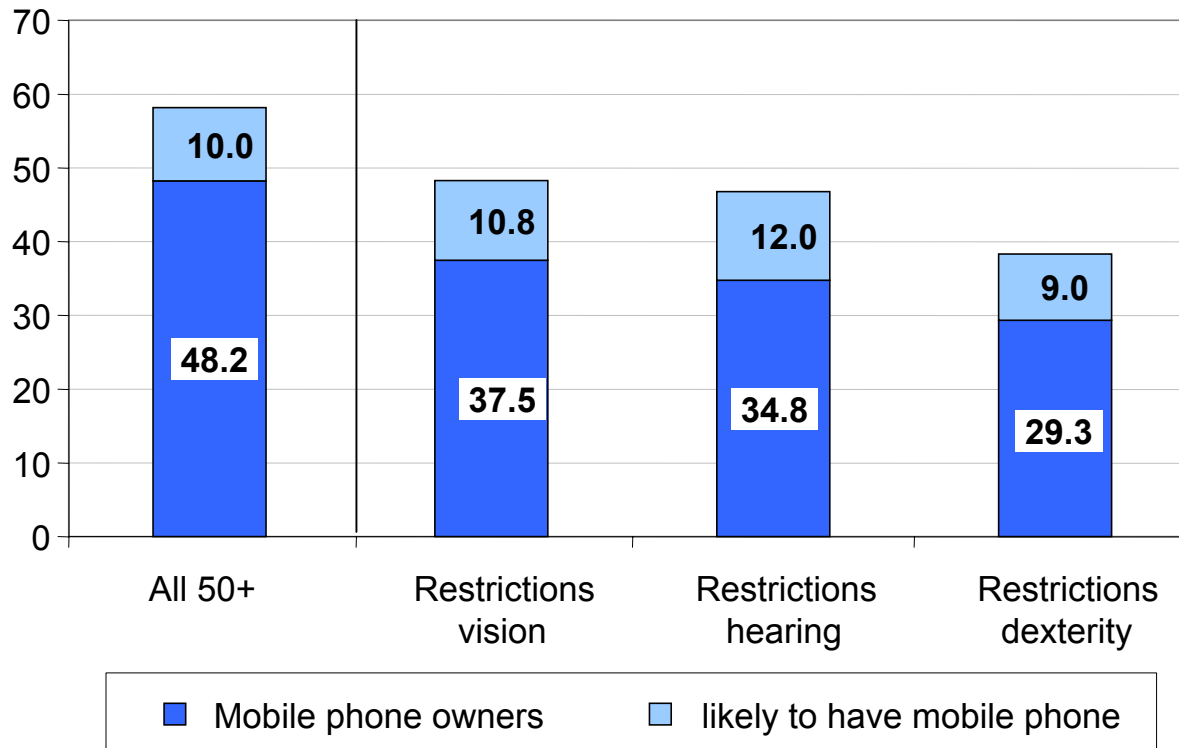
Use of and plans to use internet within the next one or two years
(as % of total older population)



- Internet market heading for 60 % growth within 2 years
- Particularly vision and dexterity disabilities need attention by internet services

Mobile phone demand and market growth among people with functional restrictions

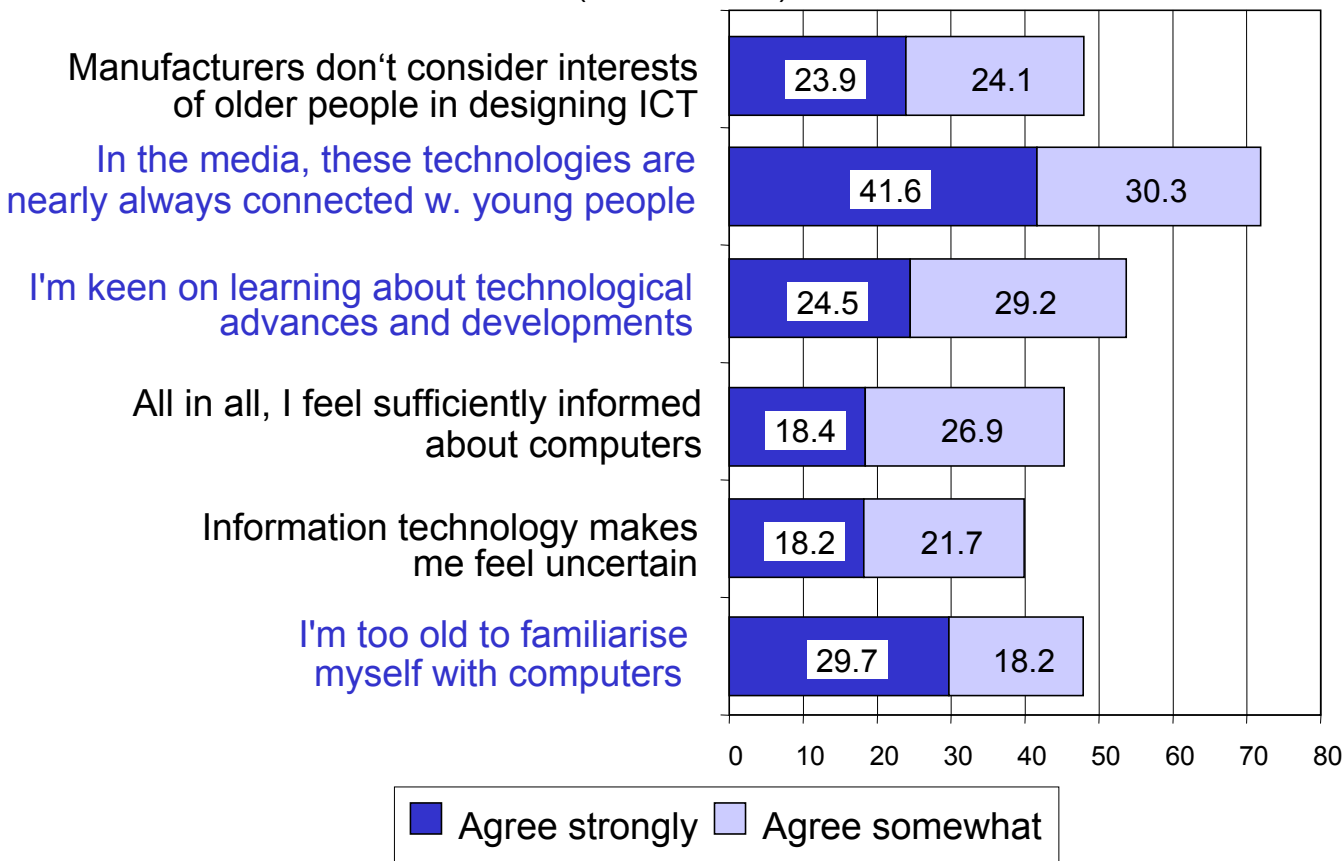
Use of and plans to have mobile phone within the next one or two years
(as % of total older population)



- Mobile phone market has quickly become mature: only 20% growth expected on a high penetration level

Attitudes towards ICT - Many fear to be excluded from the Information Society

IST attitudes
(as % of total)



- Older people feel unrecognised as target group (70 % say ICT is only connected with younger people)
- 48% of older population blame manufacturers not to incorporate their needs in product characteristics
- More than half are keen on following technological developments
- One half each feel or do not feel too old to familiarise with computer technology

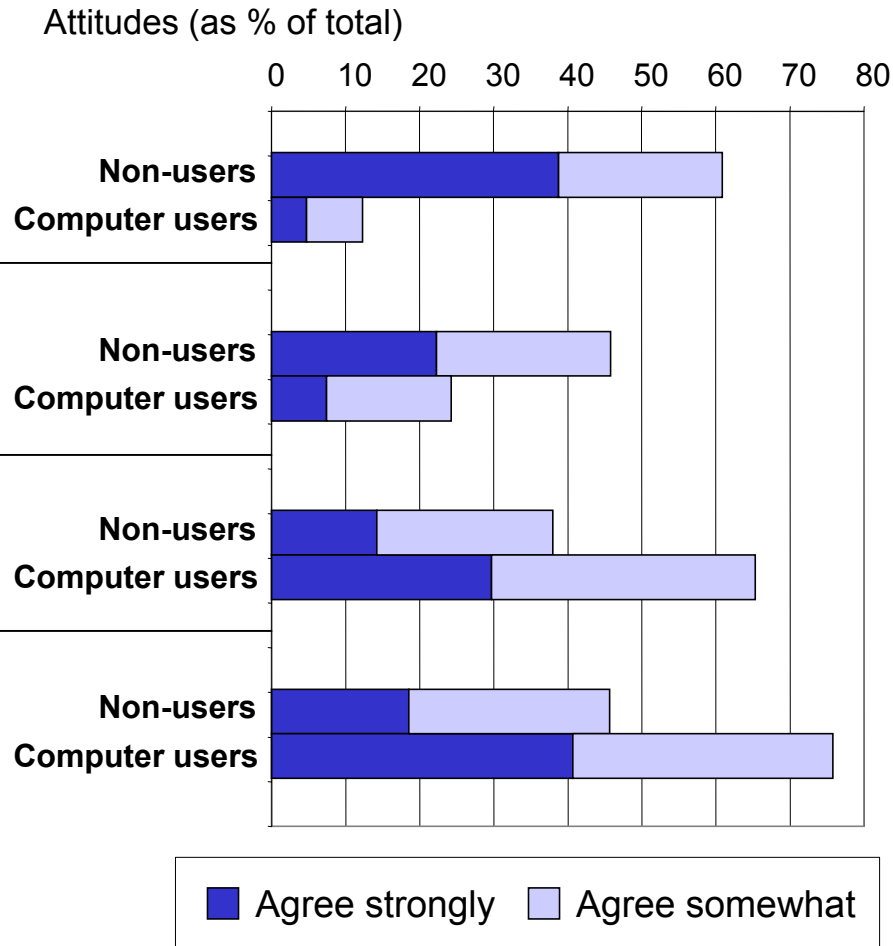
Attitudes towards ICT depend on ICT experience ...

I'm too old to familiarise myself with computers

Information technology makes me feel uncertain

All in all, I feel sufficiently informed about computers

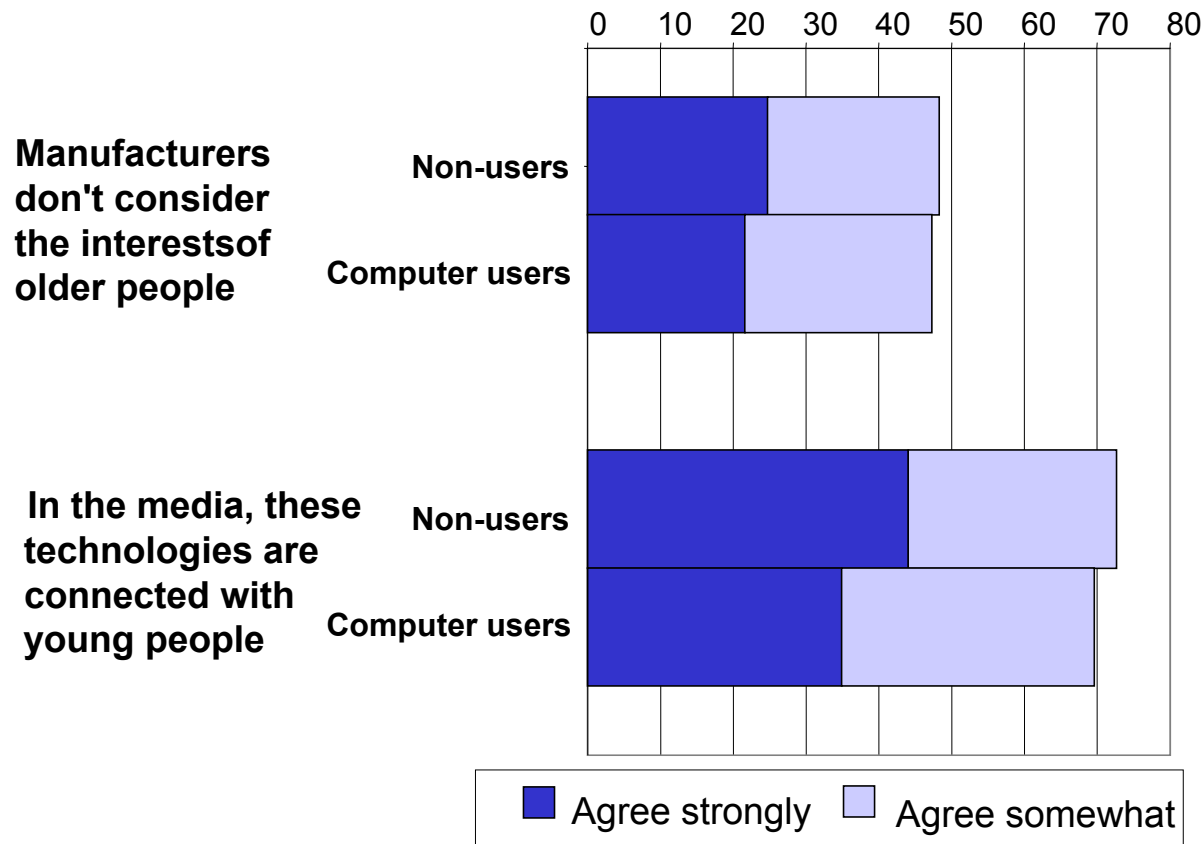
I'm keen on learning about technological advances and developments



- Strong dependence of ICT attitudes on computer usage
- 60% of non-users feel too old to avail themselves of computers
- Less than 40% of non-users feel sufficiently informed
- Users are quite satisfied with their information (2/3 of users, 38% of non-users)
- 3/4 of users are keen on learning about technological developments, but also 45% of non-users

... however, this is not always the case

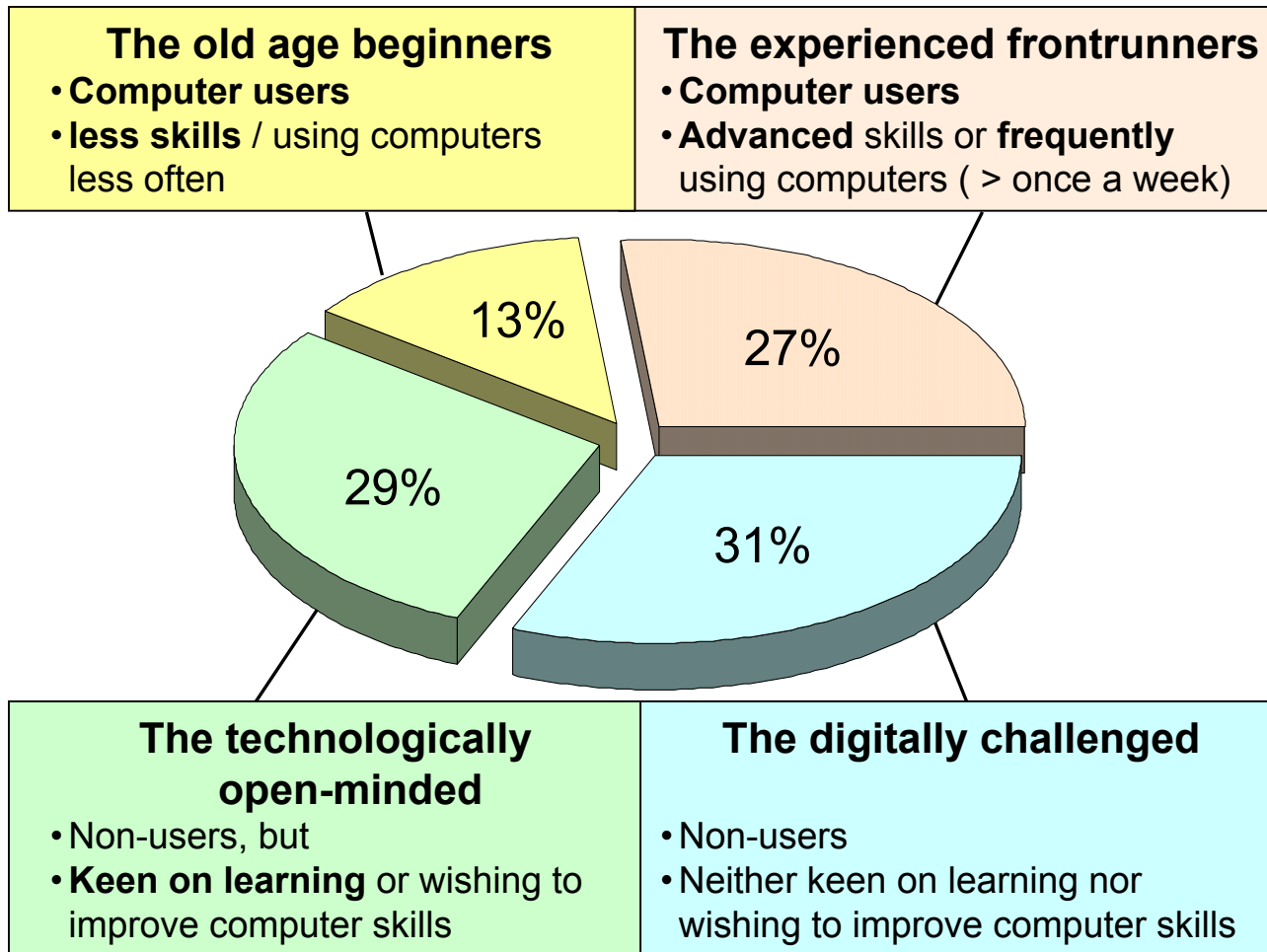
Attitudes (as % of total)



- Complaints about ICT not being adapted to older people's needs are prevailing as much among users as among non-users (Both almost 50%, 30% disagree, 20% no opinion)
- The same holds true for the complaint about public ignorance of older people as technology users (70% agreement)

Societal challenges

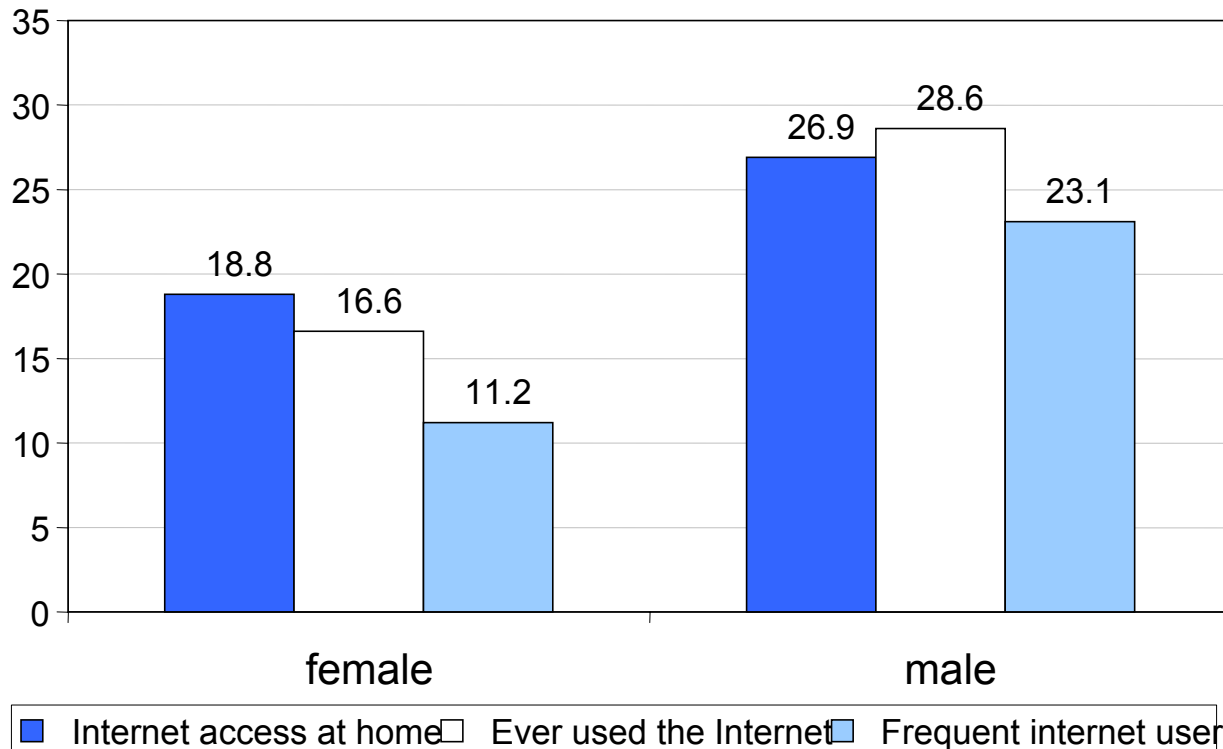
ICT involvement - Older population covers broad spectrum



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

Gender Gap - Example Internet

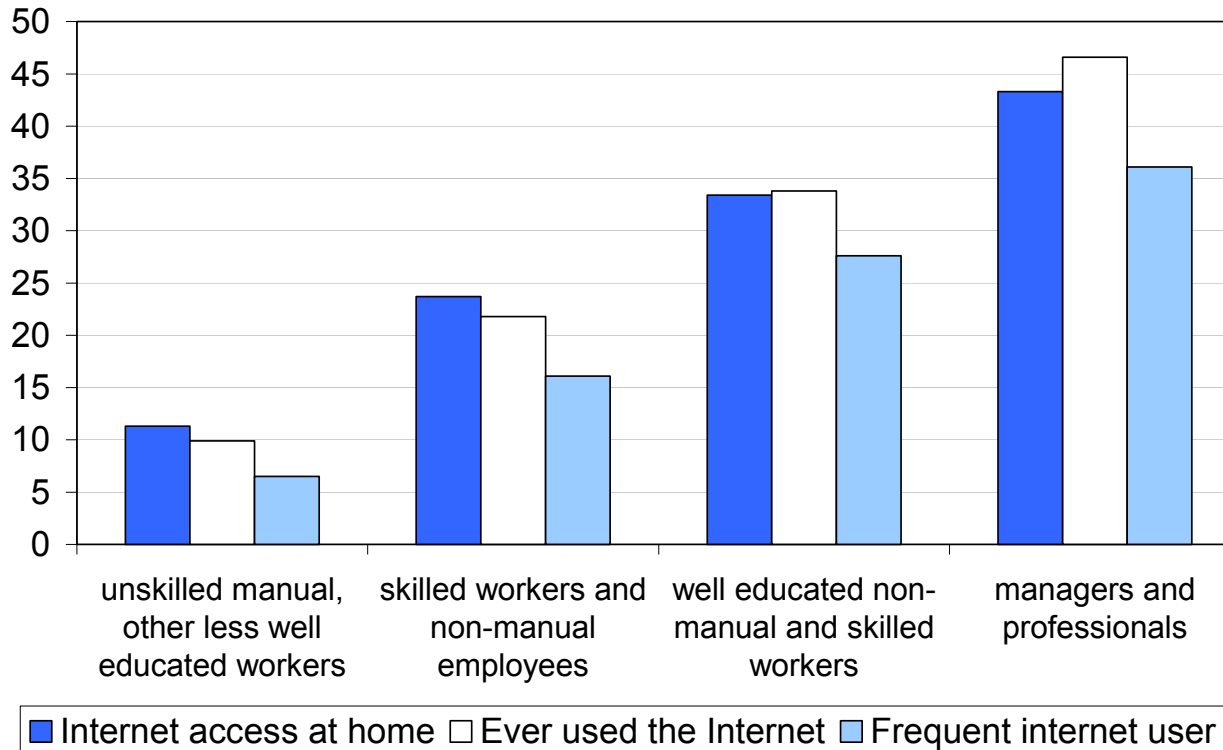
Internet access and usage by gender
(as % of total)



- The gender gap is still considerable: Men are about twice as likely to be internet users as women
- 23% of male elderly are frequent internet users, 11% of women
- Access (in households) is not as distinctive as actual usage
- Internet experience - among other things - reflects the gender specific educational attainment and labour participation rates
- The gender effect strongly decreases when controlling for age, income and educational attainment

Usage hinges on educational and occupational opportunities

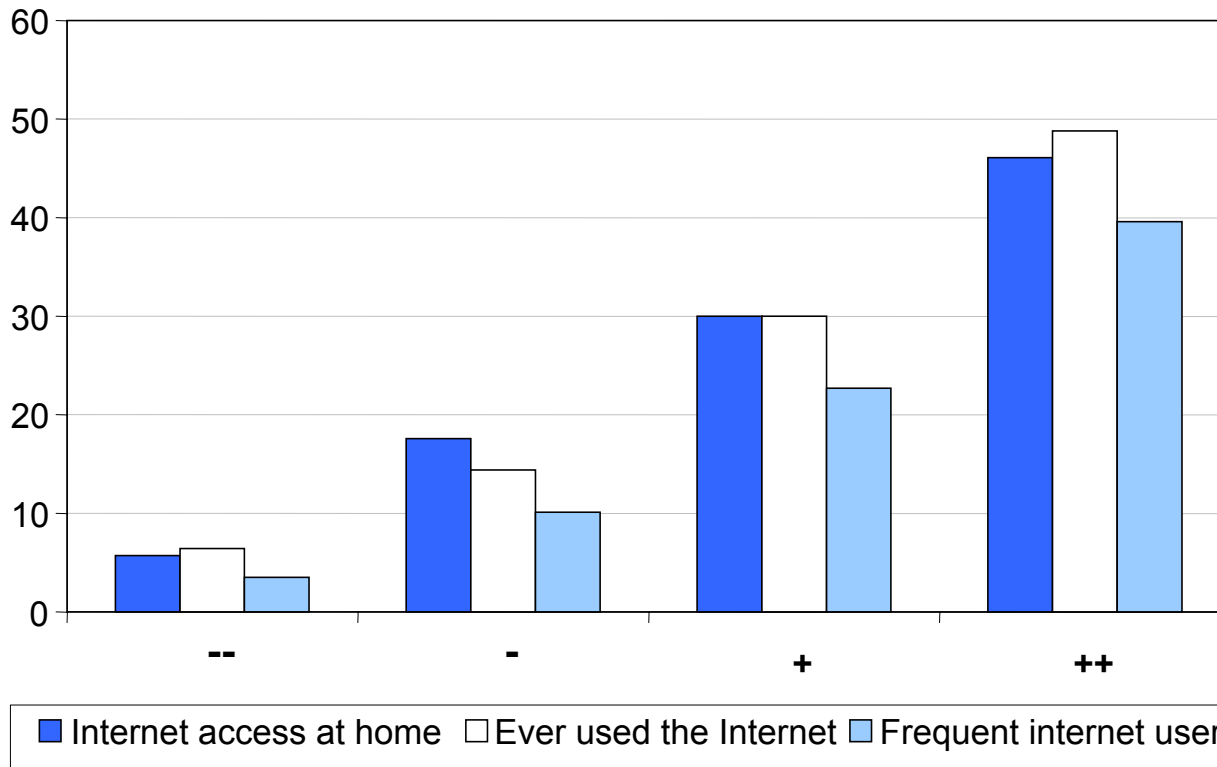
Internet access and usage by social grade (SES)
(as % of total)



- Access and usage follows societal stratification patterns
- Upper middle class senior citizens hardly differ from the population average
- Information highway has hardly reached less well educated households
- Socio economic status (SES) is a compound indicator, ascribed to a household and derived from the main income earner's educational attainment and professional status

Income a major factor of internet usage

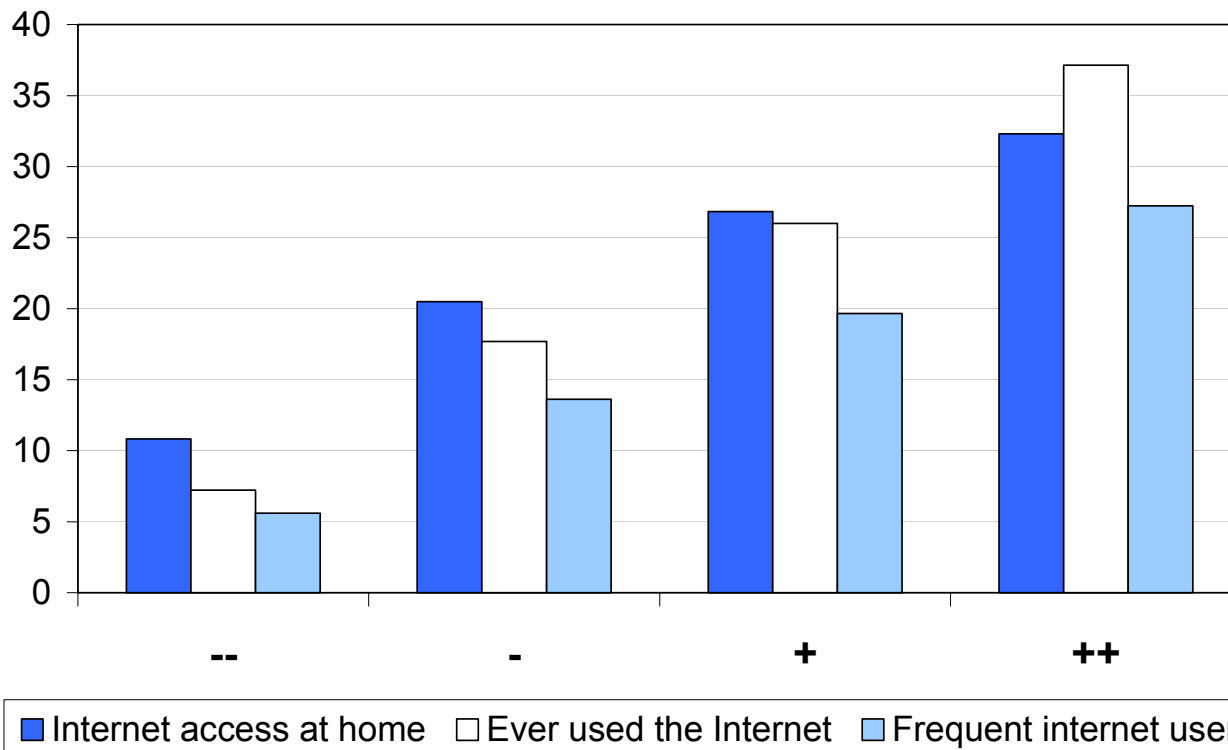
Internet access and usage by income level
(as % of total)



- Uptake in highest income class is approaching 50%
- Low income persons run the risk of exclusion from the Information Society
- Income is measured country-specific, i.e., relative to respective national income distribution
- Income is closely related to SES ...
- ... but remains an independent predictor when controlling for age, SES and education

Internet involvement also a matter of active lifestyles

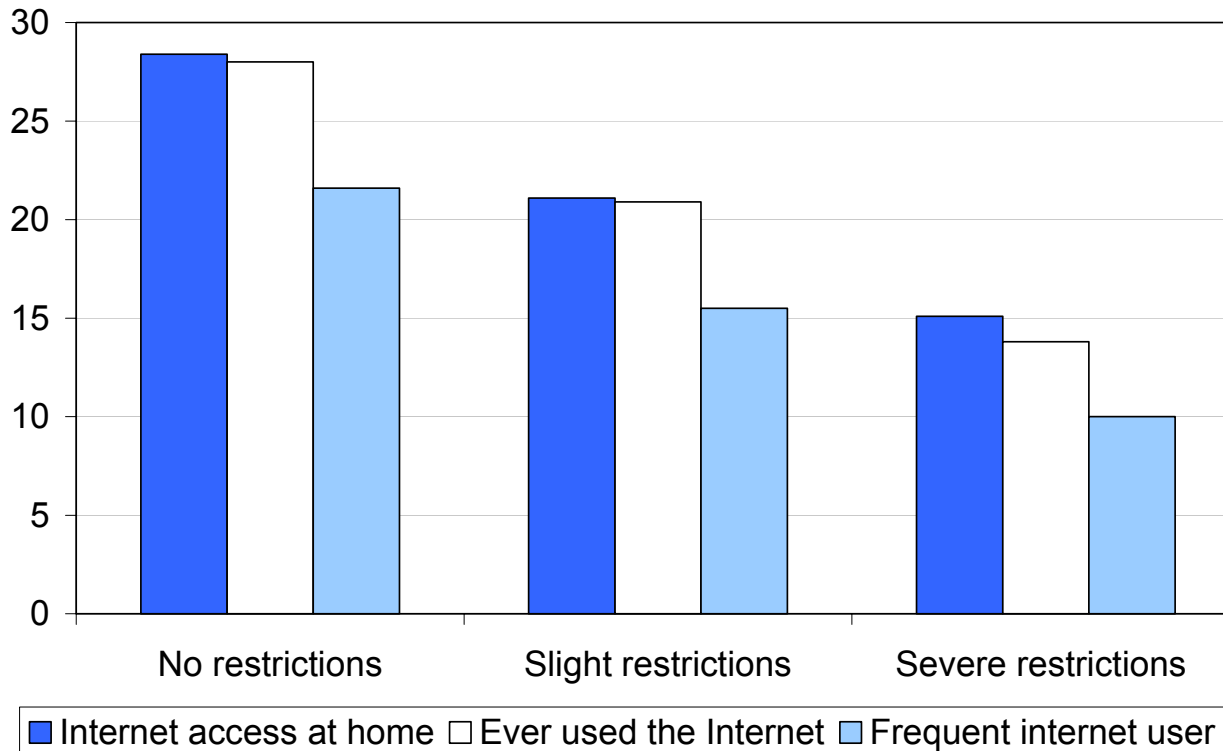
Internet access and usage by Activity / Lifestyle Orientation
(as % of total)



- Activity / lifestyle orientation is a compound indicator derived from time spending patterns and subjective valuation of several activities in one's life
- Activity oriented lifestyles are quite strongly associated with internet involvement: generic activity level determines internet usage
- When controlling for age and income the effect remains significant

Impairment restricts internet activities

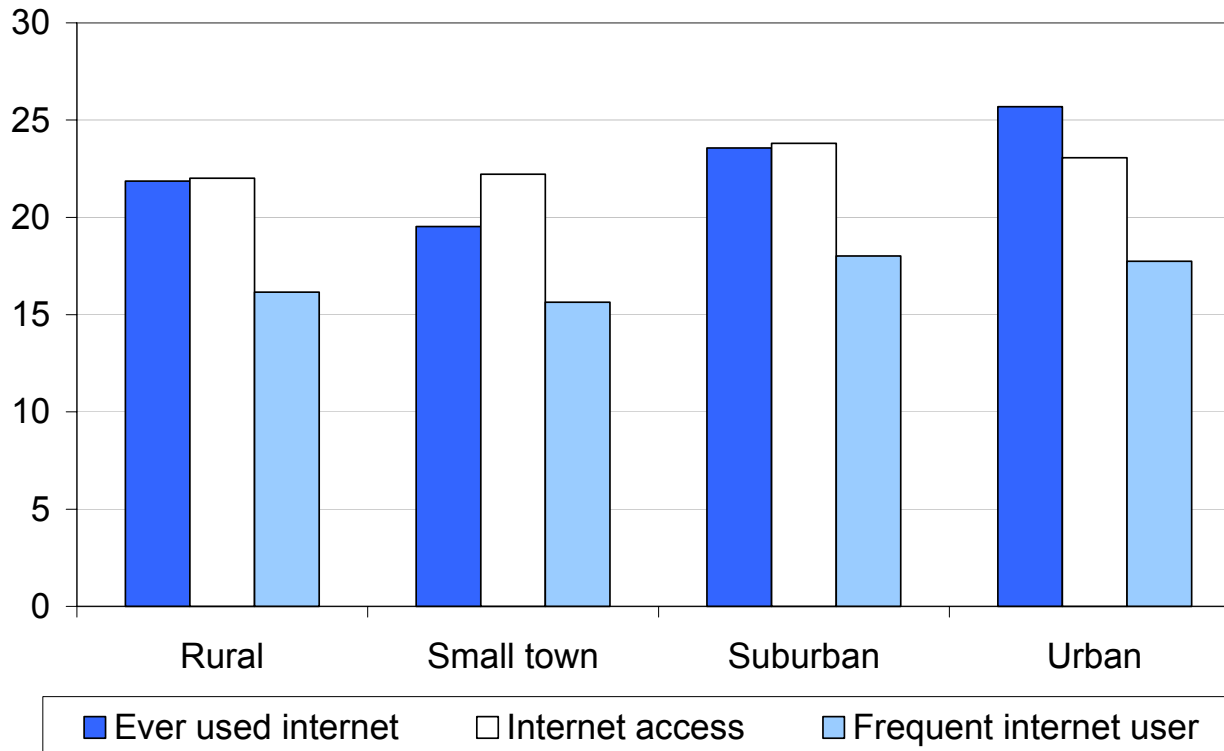
Internet access and usage by impairment
(as % of total)



- Impairment is a compound indicator of physical restrictions (vision, hearing, and tactile/motoric difficulties)
- People suffering from severe impairments are only half to two thirds as likely to avail themselves of the internet
- Impairment is associated with age
- The effect of impairment becomes quite small when controlling for age and income (yet remains significant)

Minor urban-rural gradient re internet usage

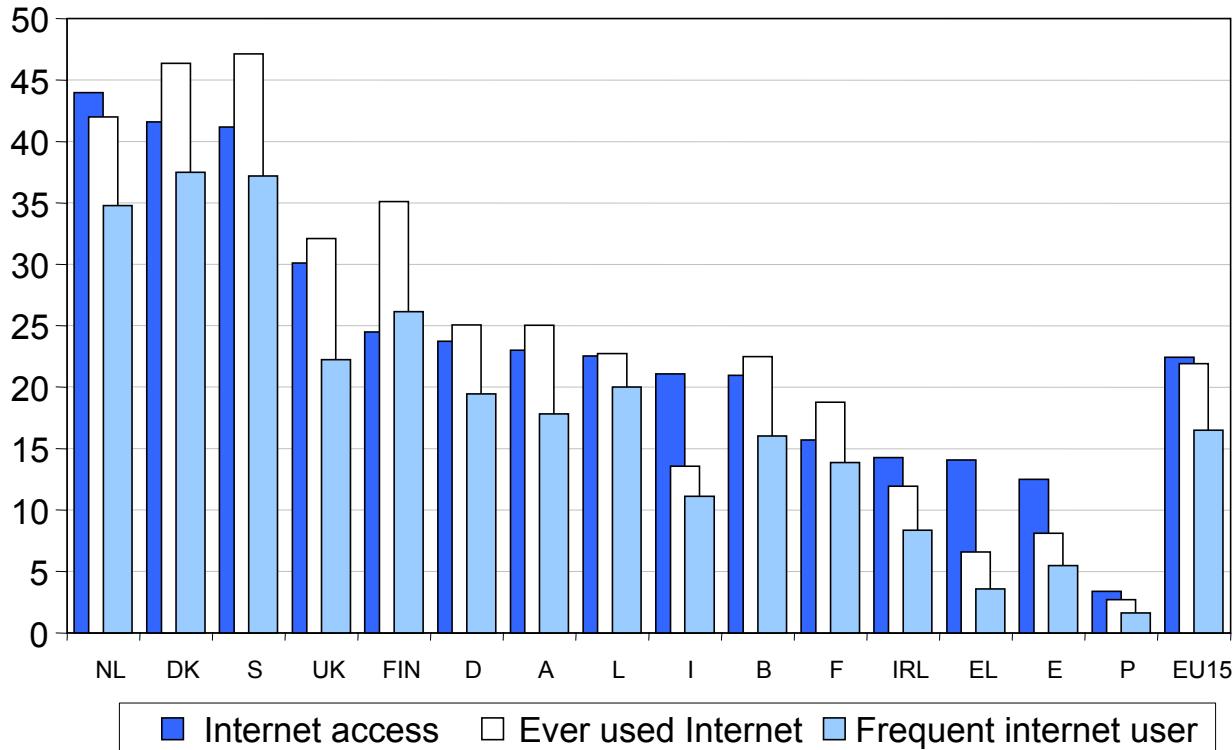
Internet usage by type of area



- The regional population density has almost no impact on internet usage

Strong EU north-south gradient in internet usage and access

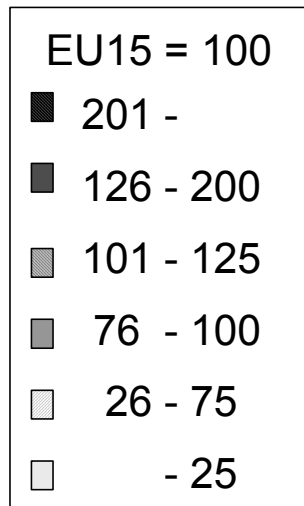
Internet access and usage by Member State
(as % of total)



- Internet **access** benchmark is the Netherlands, while Sweden and Denmark set the **usage** benchmark
- Southern Europe and Ireland are challenged to catch up

North South Gradient re internet usage

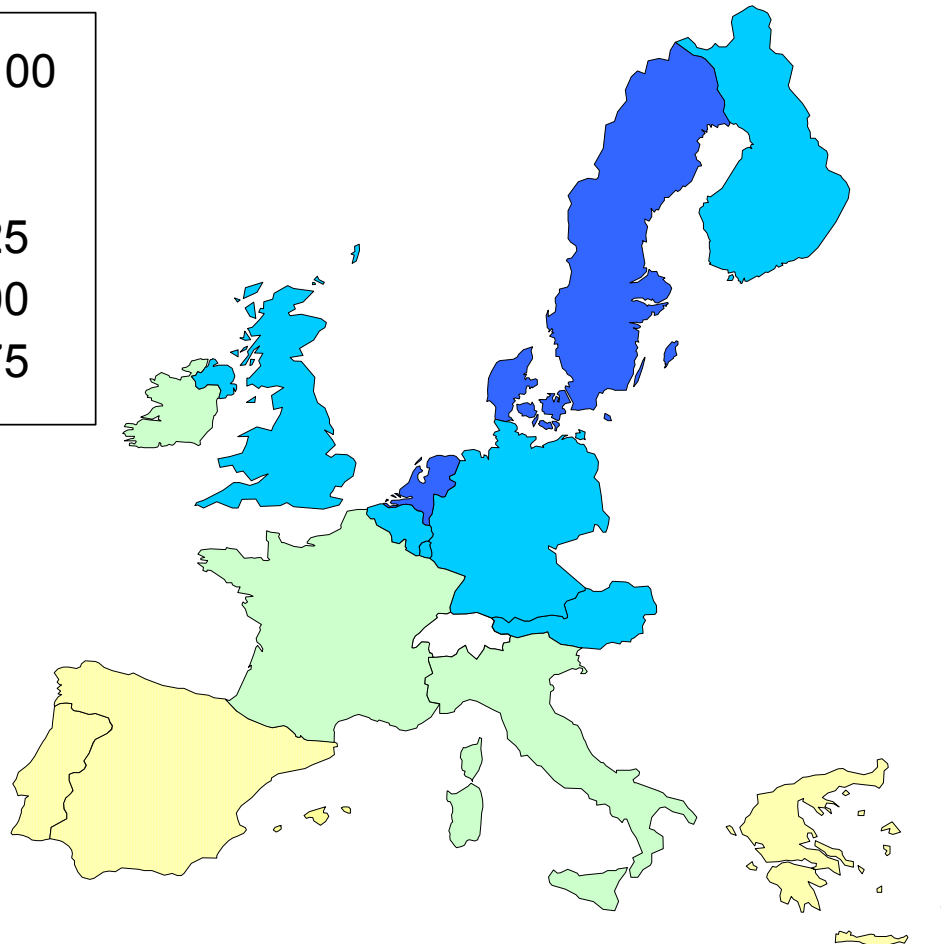
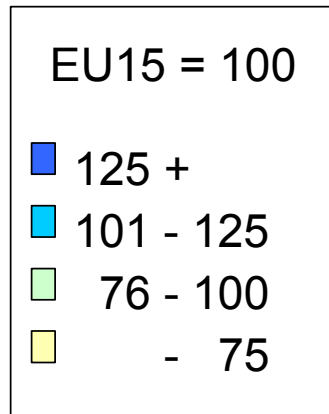
Regular internet users



- Shares of internet users in the older population vary considerably across Europe

North South Gradient re generic ICT usage

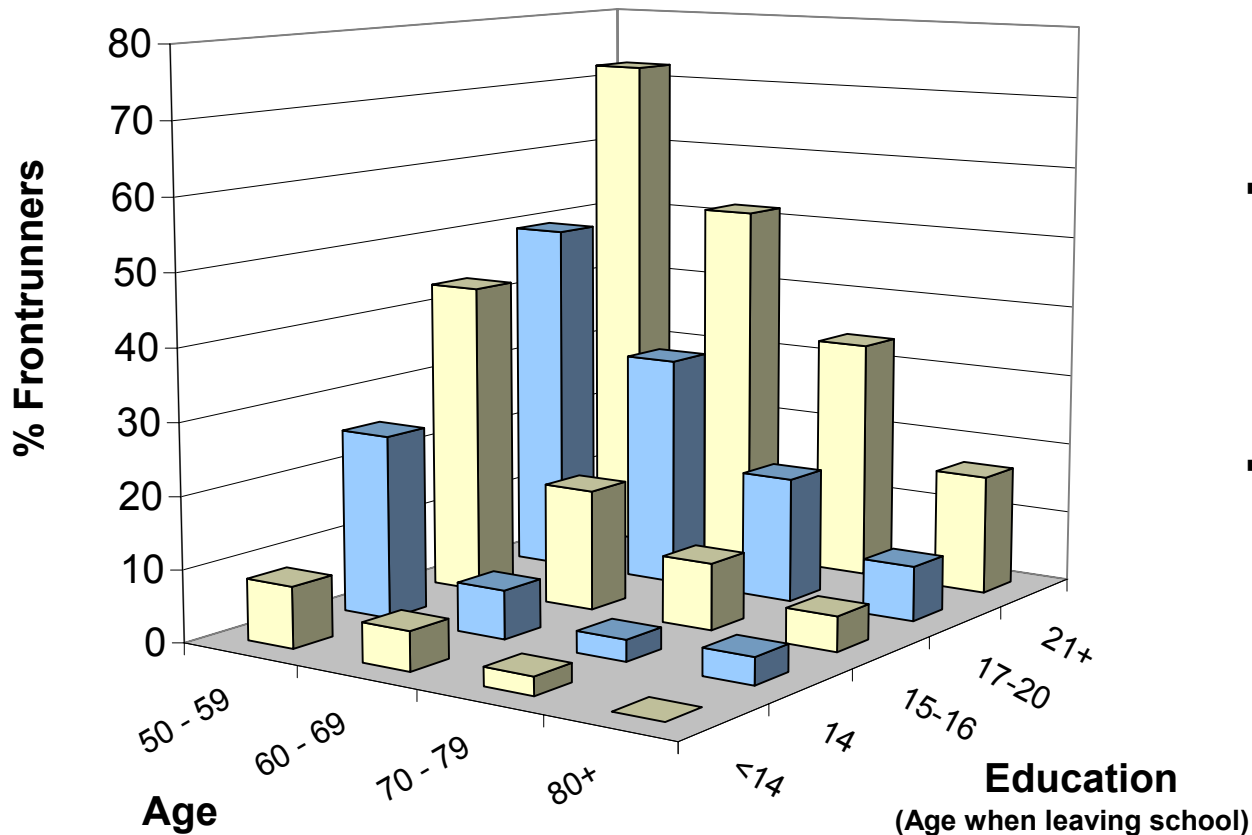
ICT usage index



- The average number of ICT products and services out of 14 items does not vary as much across Europe

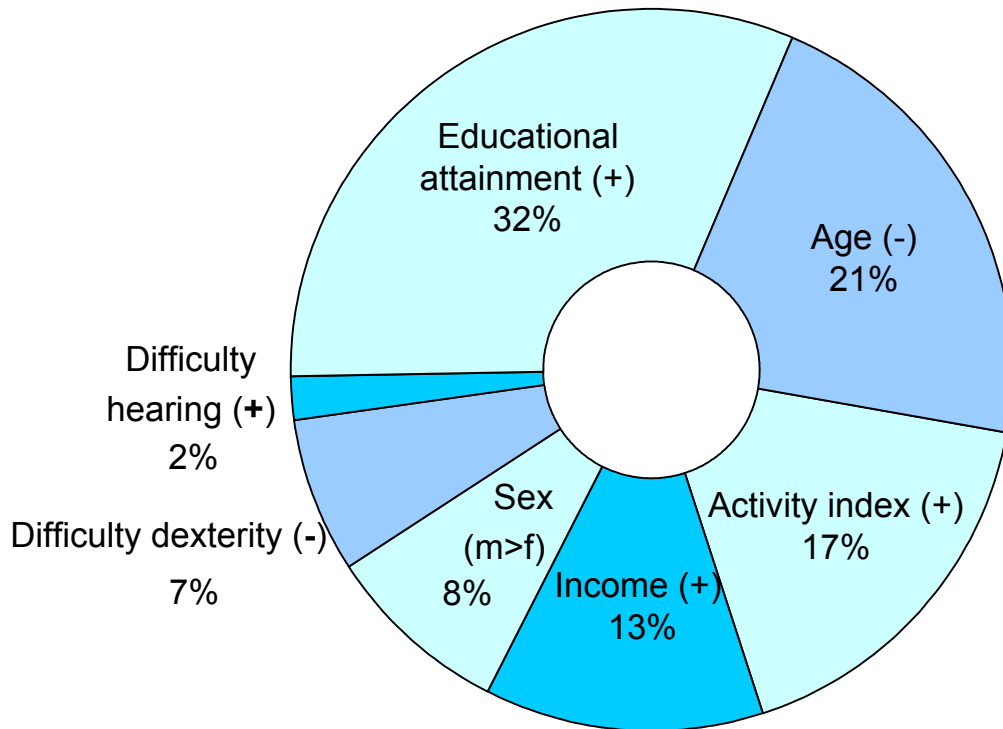
ICT involvement as a matter of age and education

Experienced Frontrunners as % of age-education groups



- 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

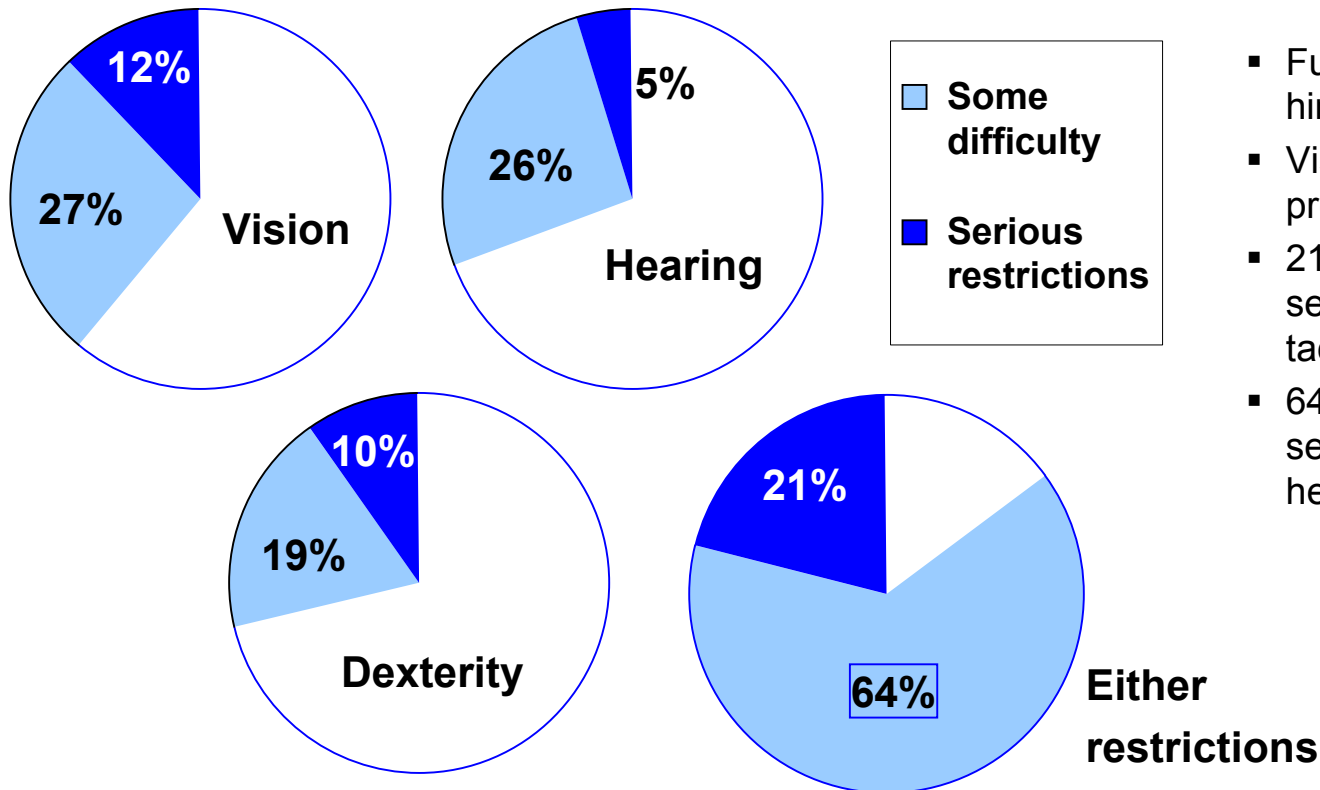
ICT involvement a matter of different factors - Determinants by comparison



- Educational attainment is the dominant variable in explaining IST involvement
- Age and income are also strongly discriminating factors
- Activity orientation represents the very significant lifestyle part of IST take-up
- Gender differences are still significant but not as relevant as other demographic variables
- The remaining explanatory power of impairment is only small: Having hearing troubles makes involvement more, dexterity less likely. Vision is not relevant in this model.

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

Prevalence of functional restrictions
as % of older population

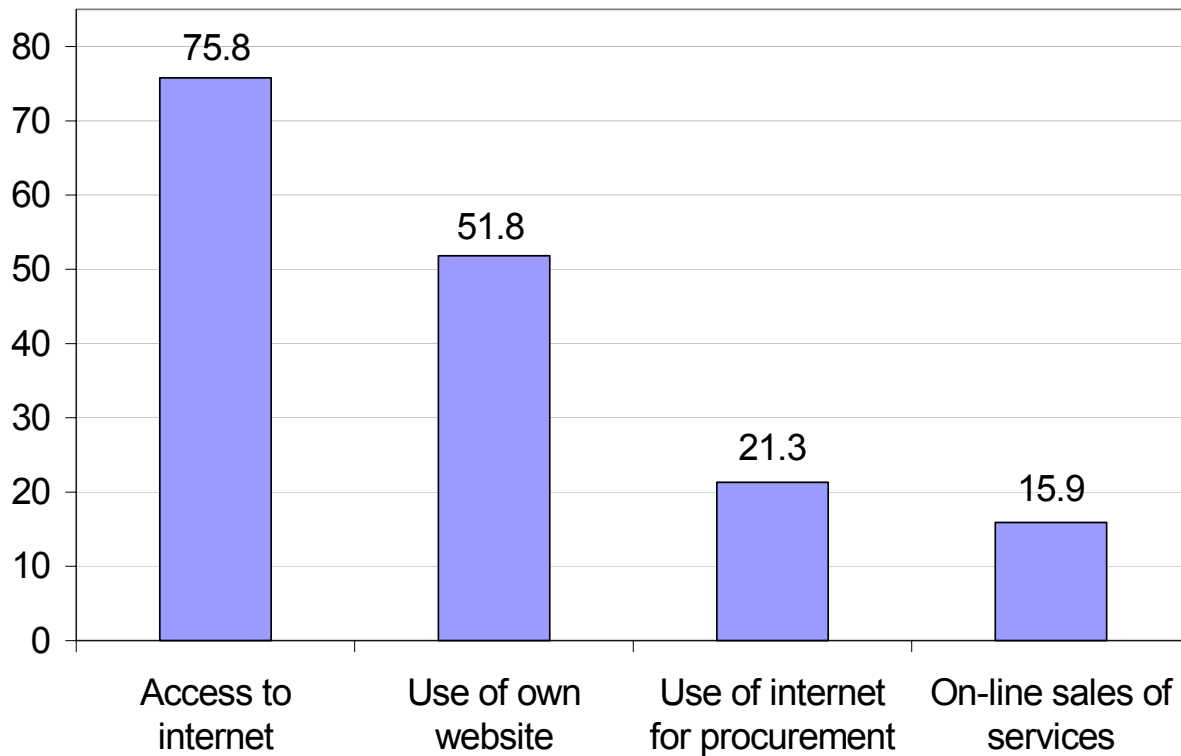


- Functional restrictions often hinder full scale IST uptake
- Vision restrictions are most prevalent
- 21 % suffer from either severe vision, hearing or tactile restrictions
- 64 % suffer from either severe or light vision, hearing or tactile restrictions

Care challenges

Usage in care sector - internet

Actual usage of internet by care service providers
as % of care establishments (weighted according to European market share)

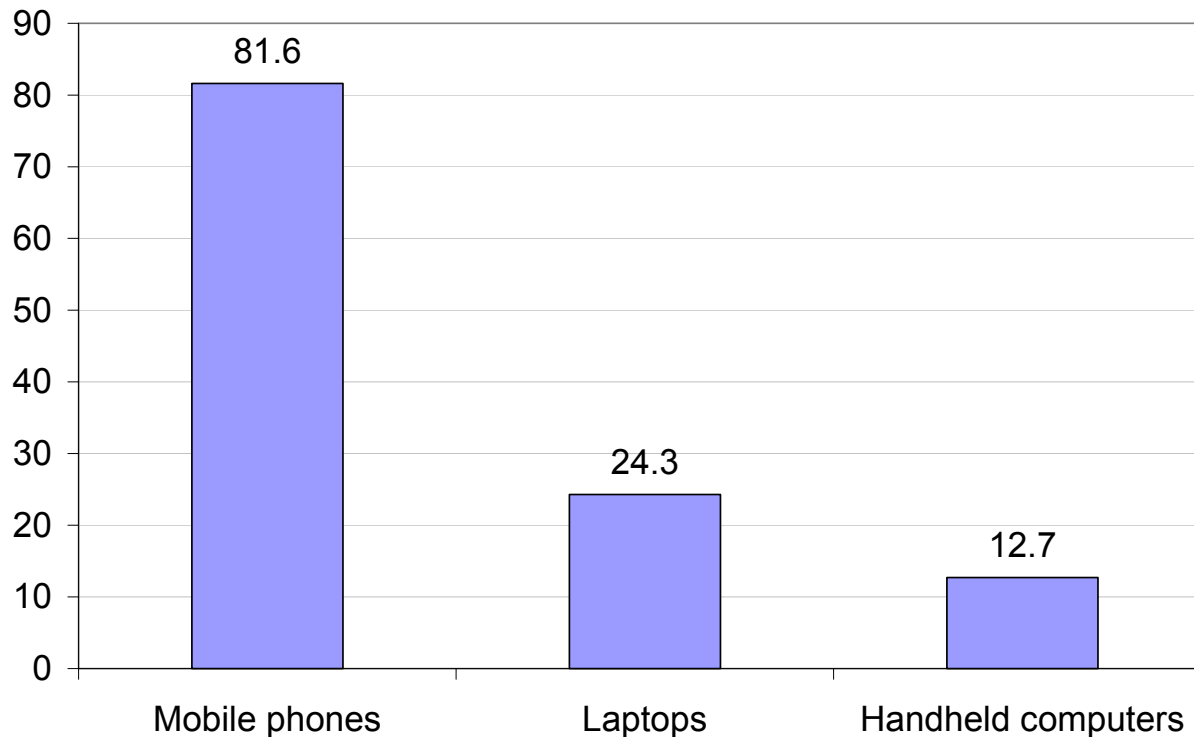


- Internet access is becoming standard in care establishments (presently 76%; about 88% in 2 years)
- More than 50% have set up their own web-site
- E-business opportunities are used only by a small proportion of care services: 21% buy and 16% sell on-line

Usage in care sector - devices used by mobile staff

Actual usage of IST by mobile care staff

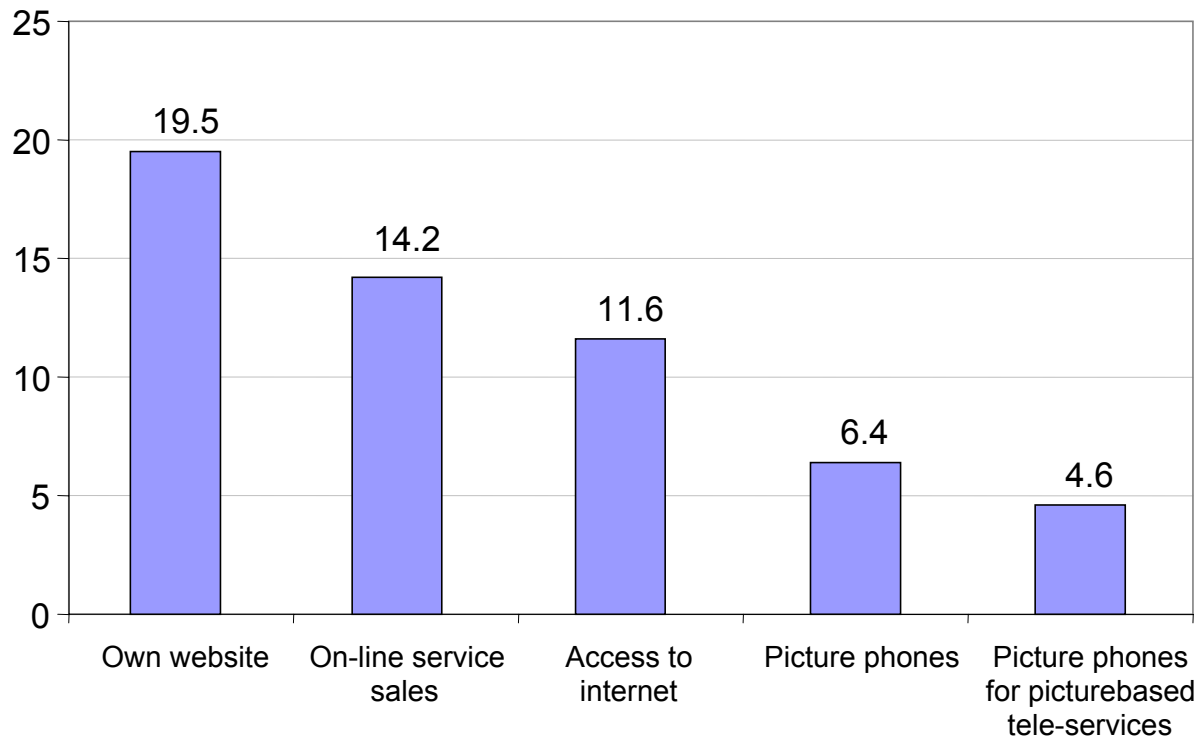
as % of care establishments (weighted according to European market share)



- Mobile phones are used by the vast majority of care services for their mobile staff (82%)
- Intelligent devices like laptops (24%) and handheld computers (13%) are applied by few enterprises only

Short term demand for IST applications in the care sector - The decision makers' estimats

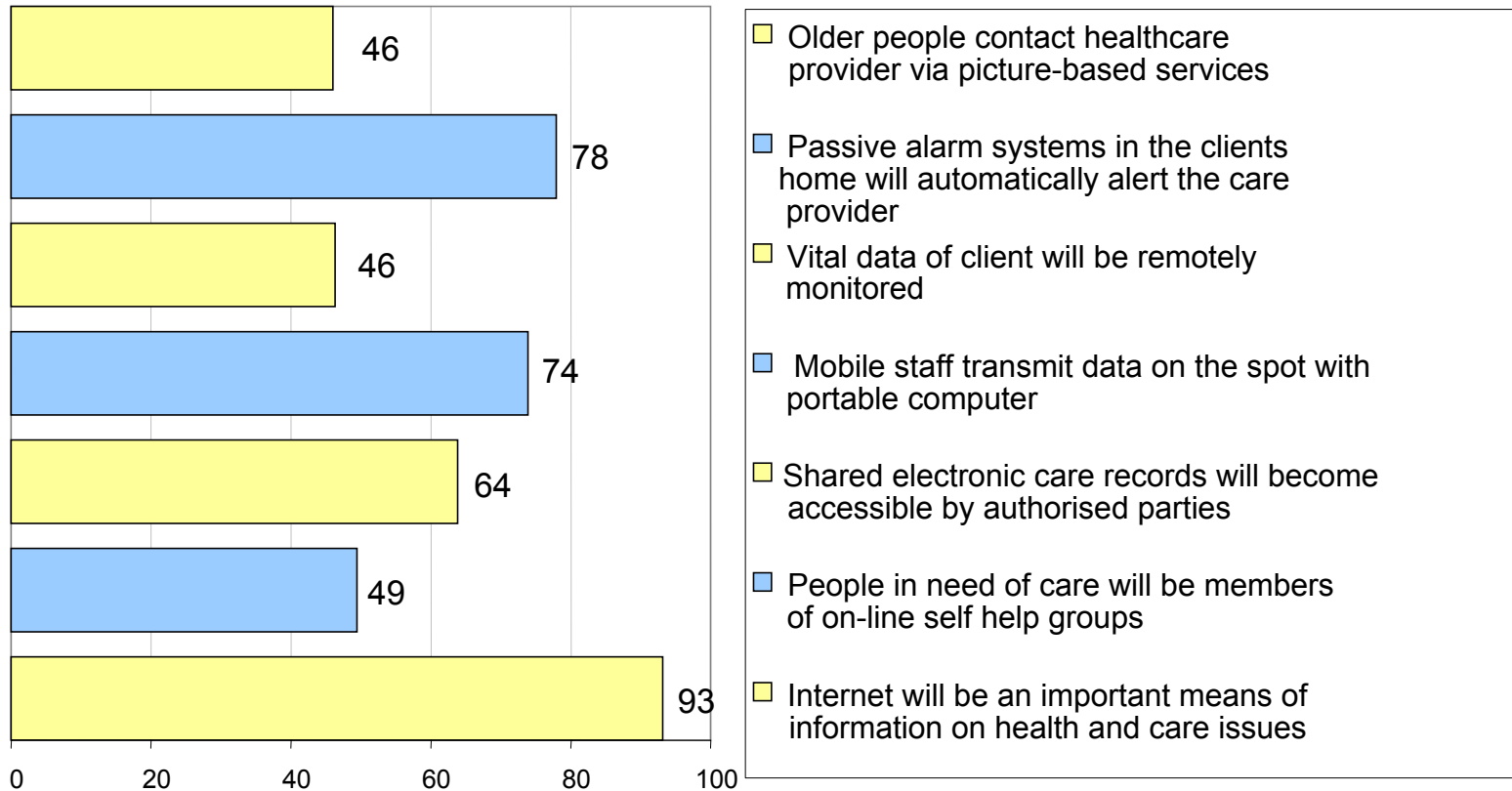
Implementation planned within two years time
% of decision makers (weighted according to European market share)



Future trends in care sector - The decision makers' views

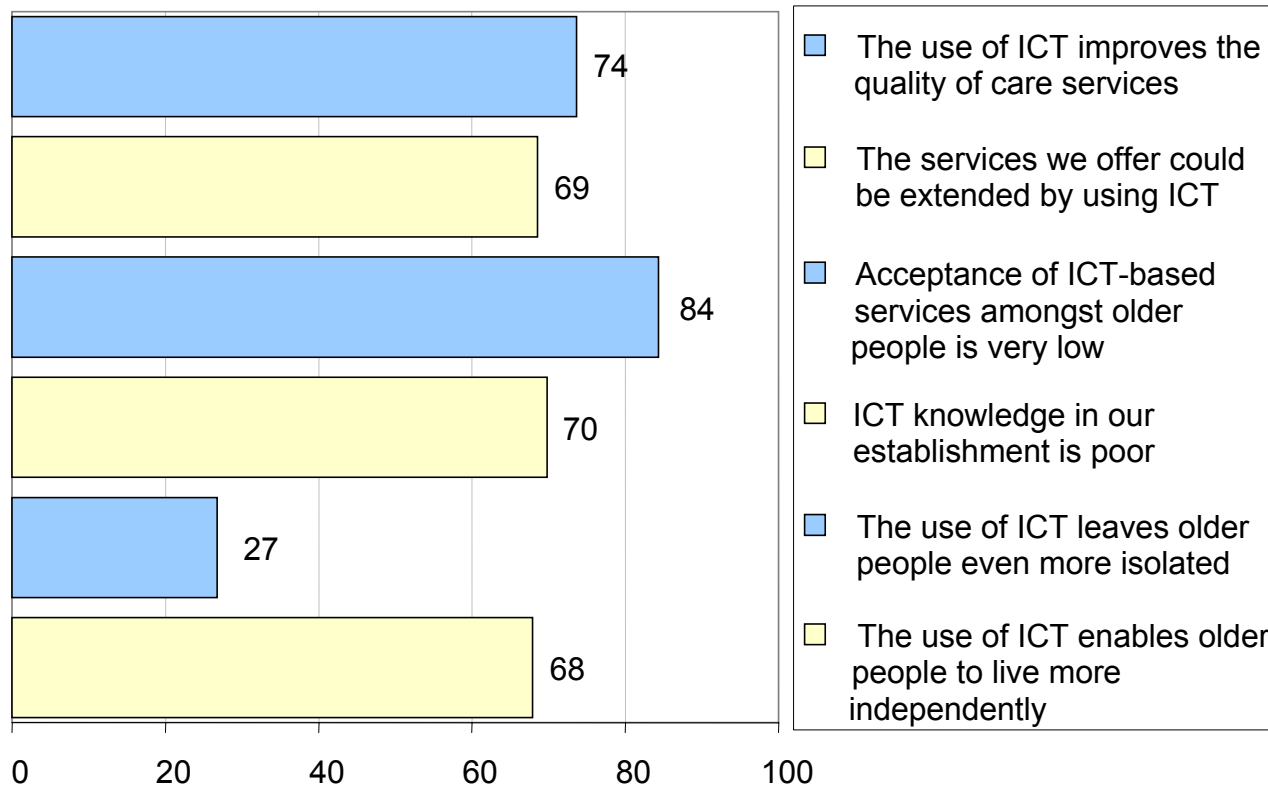
Future trends in care sector

% of decision makers stating "likely to be common within five to ten years"
(weighted according to market share)



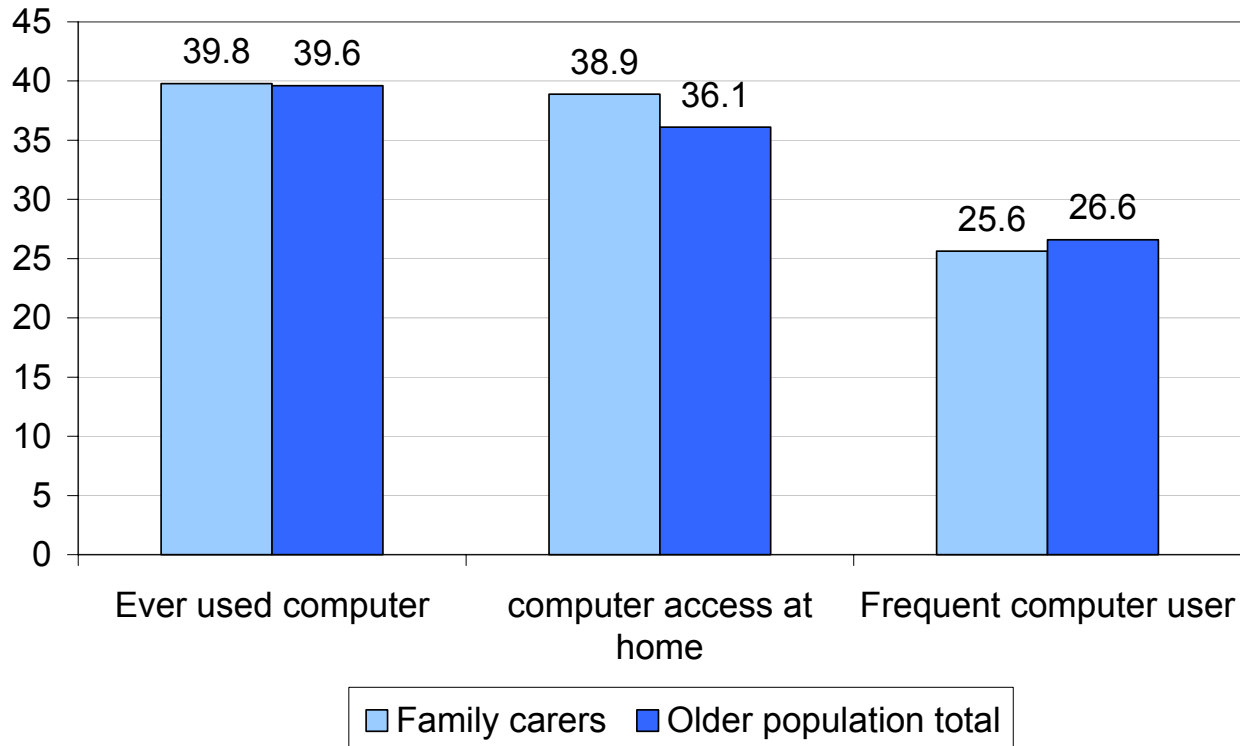
Barriers and facilitators of uptake in the care sector - The decision makers' opinions

Agreement with statements about ICT in care sector
as % of decision makers (weighted according to market share)



Family carers and IST

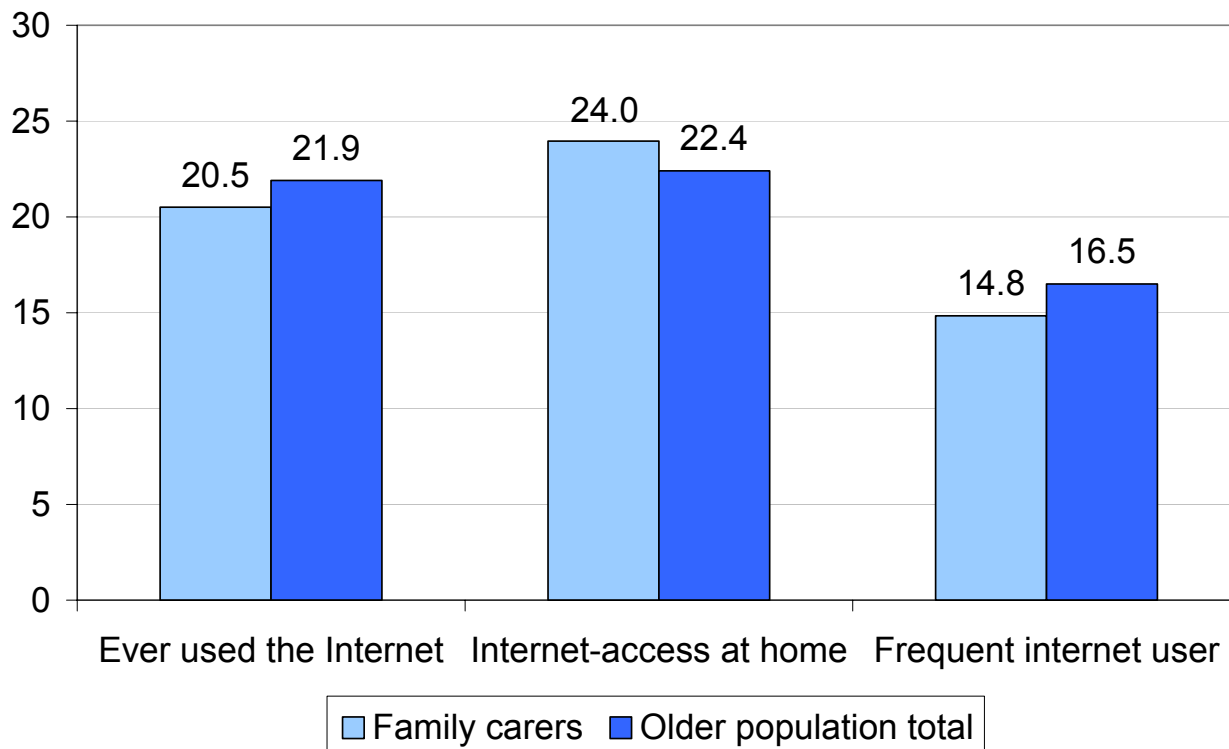
Computer involvement of family carers compared to the older population in general
as % family carers / % of total older population



- There exists no structural difference between informal carers and the older population in general

Family carers and IST

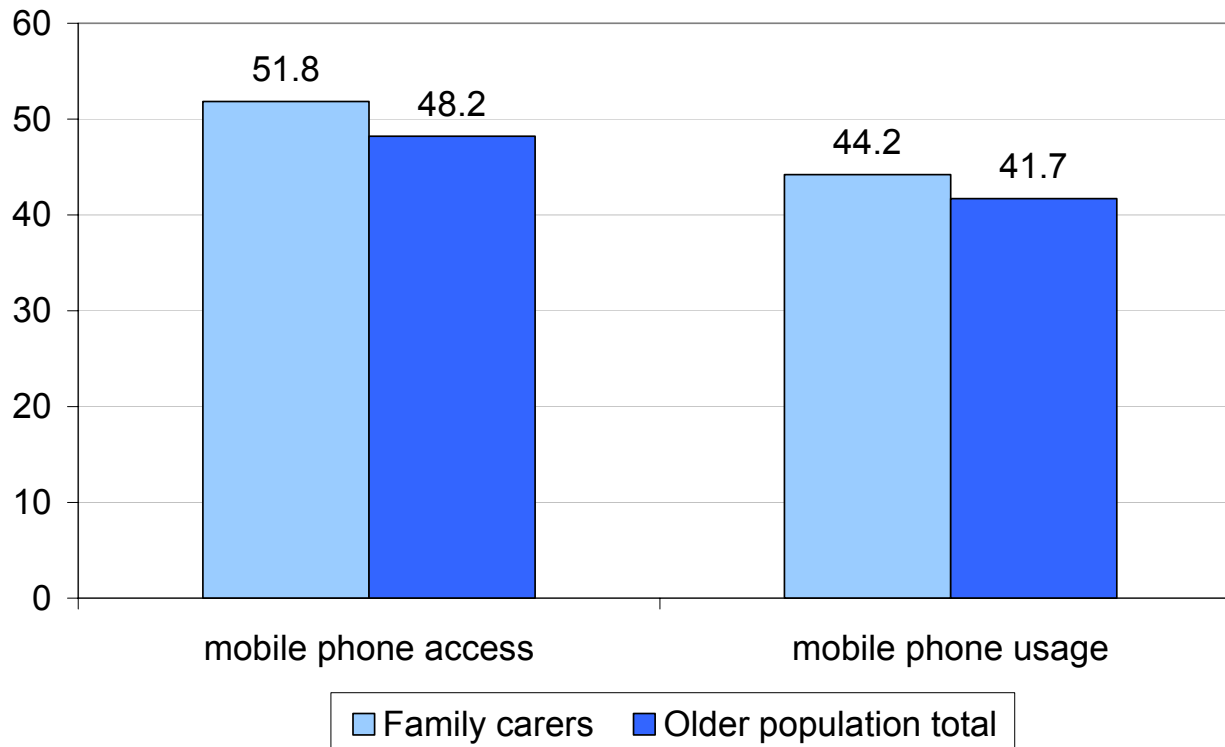
Internet involvement of family carers compared to the older population in general
as % family carers / total older population



- Again, also the use of the internet is almost identical for family carers and the older population in general

Family carers and IST

Mobile phone involvement of family carers compared to whole older population as % family carers / total older population



- Only with respect to mobile phones, family carers are slightly more likely to have access and to use them
- In Summary: The data presented on the older population in general apply to family carers as well.

Further information about this study and related research is available at

<http://www.seniorwatch.de>

<http://www.empirica.com>



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