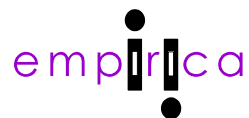


Independent living in an ageing society - some remarks on demand and supply of telecare solutions in the European Union

by

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Research context



Market-oriented study on the IST-related needs of older people (2000/02)

IST = Information Society Technologies



Home-Care Management Systems
(2000/02)

AOP-IS

The Older Generation and the Information Society (1998/99)

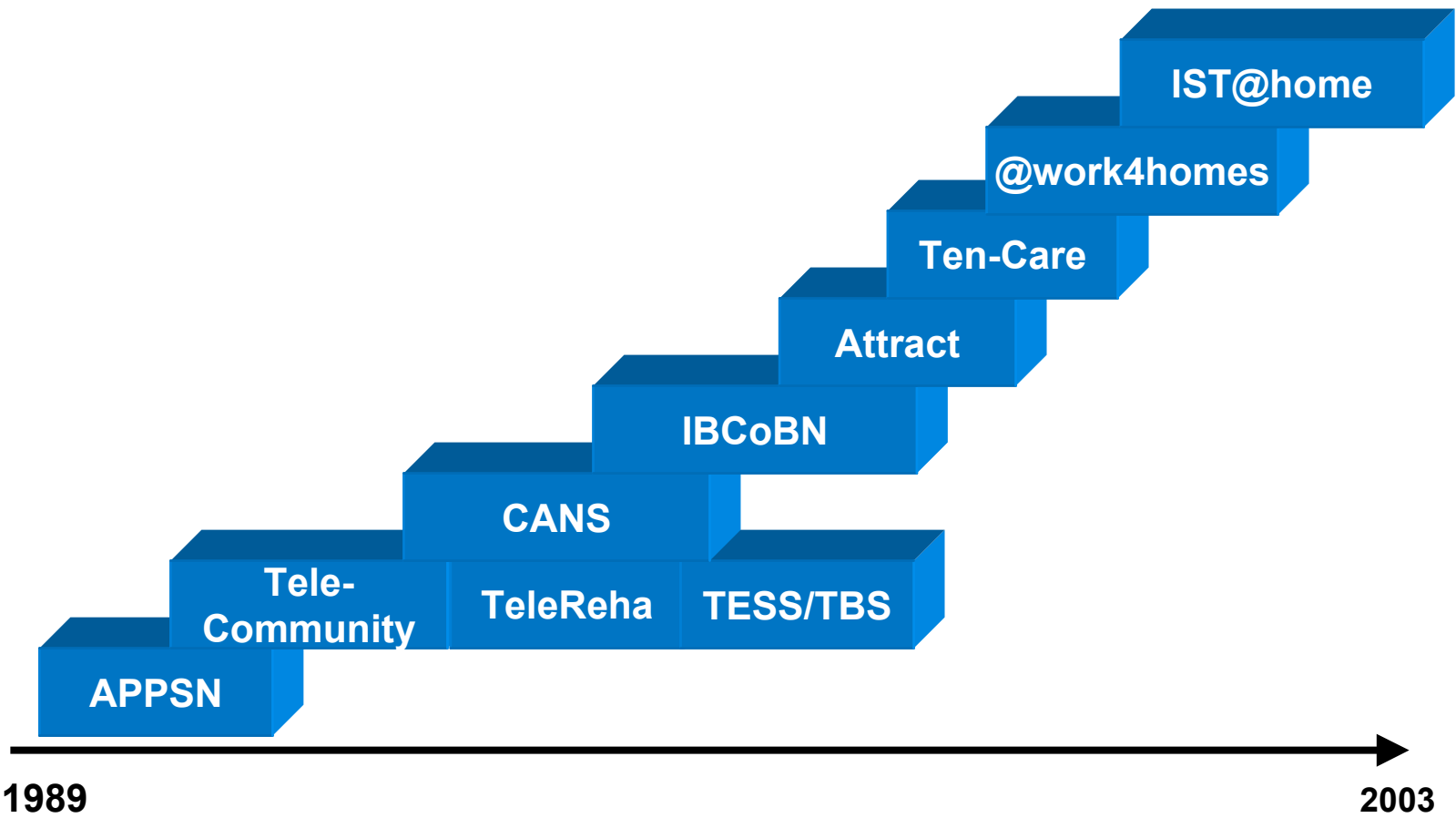
MarTel

Technology and care for Europe's Older Citizens (1994/95)

MART

Market-oriented study on telecommunications-based assistive technology, (1994/95)

Selected home care pilots involving older people across the EU



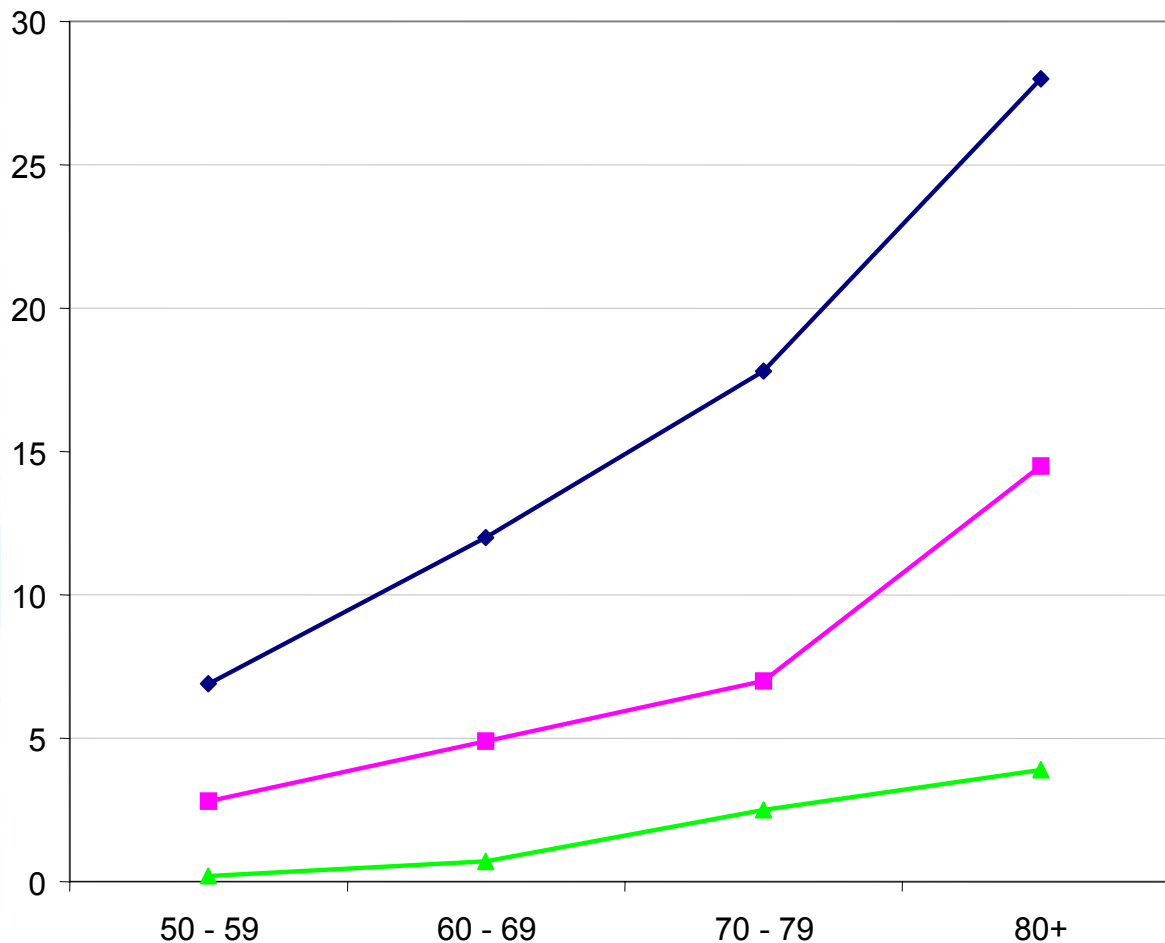
The care challenge - Prevalence of chronic diseases among the EU 50+ population

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

Source: SeniorWatch, 2002

The European 'care gap'

Percentage of EU 50 population (2001)



...expressing a need for care

...actually receiving care

...thereof cared by professional service

Source: SeniorWatch, 2002

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 hold the promise to help meeting these economic and societal challenges**

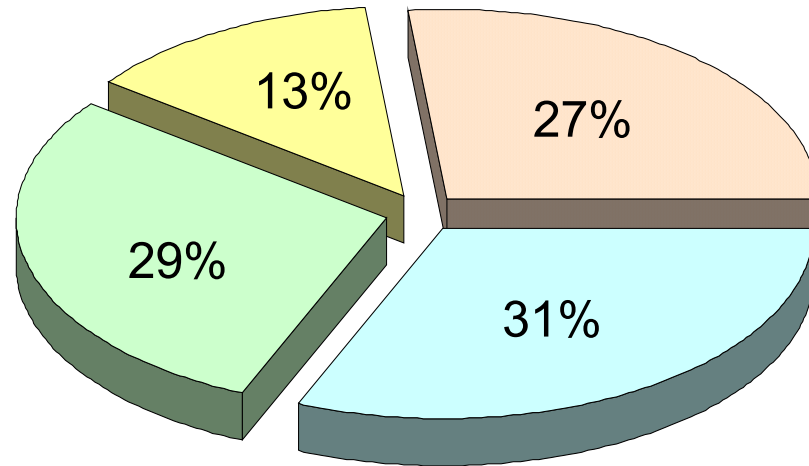
Are older Europeans ready to utilise IST solutions for their purposes ?

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)



A generic typology of IST involvement

Source: SeniorWatch, 2002

The technologically open-minded

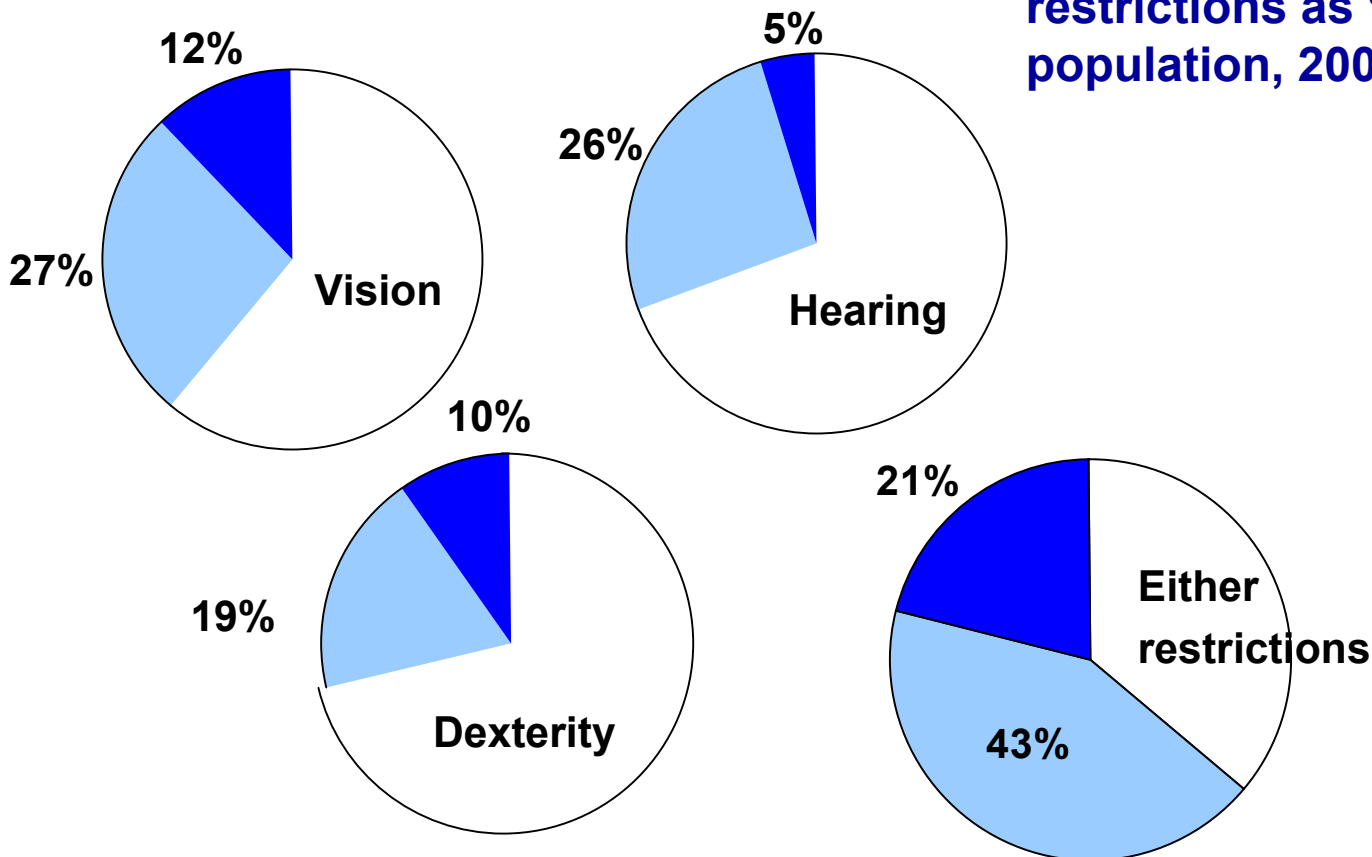
- Non-users, but
- **Keen on learning** or wishing to improve computer skills

The digitally challenged

- Non-users
- Neither keen on learning nor wishing to improve computer skills

Functional restriction often hinder full scale IST uptake

Prevalence of functional restrictions as % of EU 50+ population, 2001



some difficulty
 serious restrictions

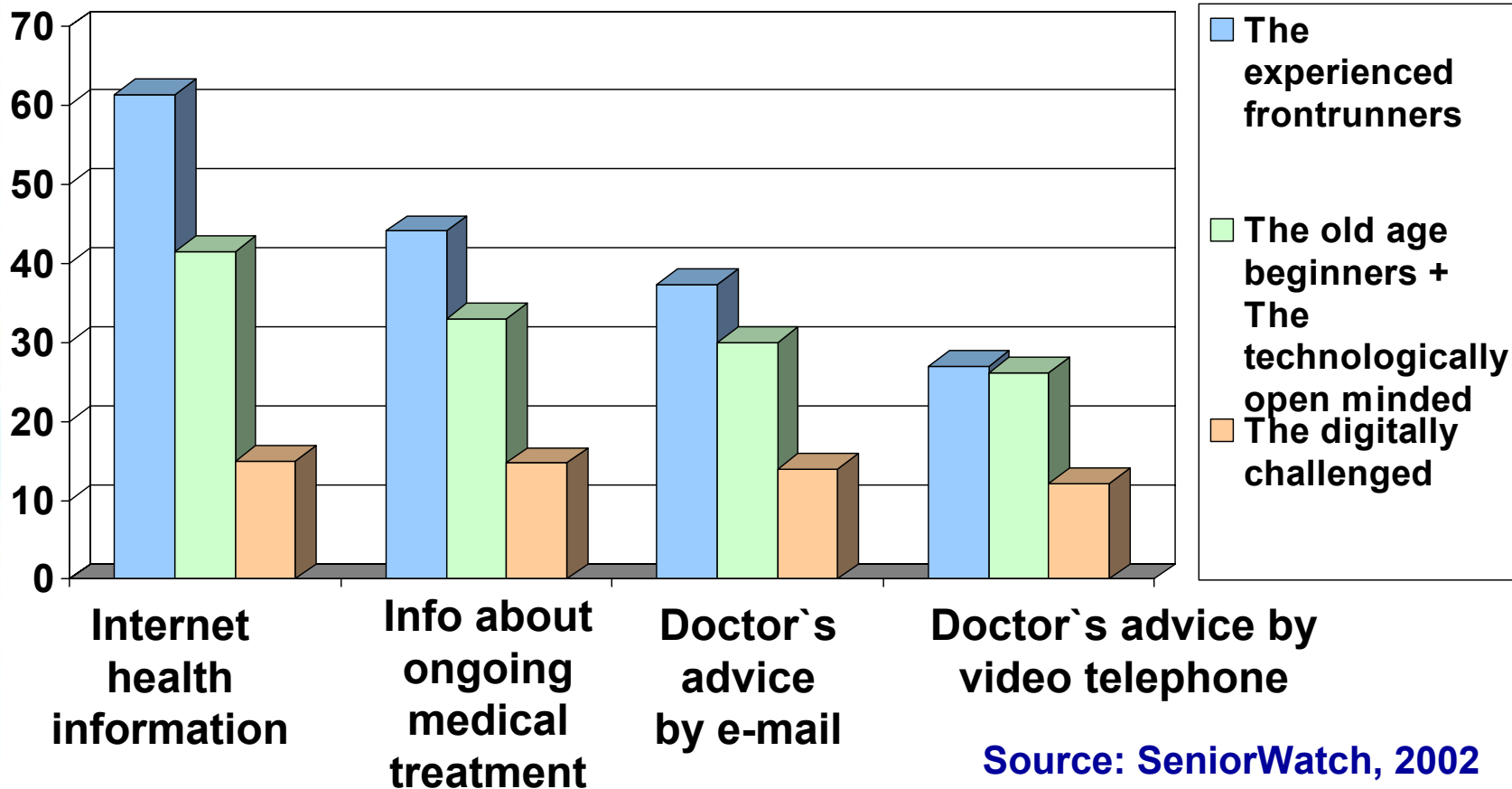
Source: SeniorWatch, 2002

Market potential for IST-based solutions re the chronically ill

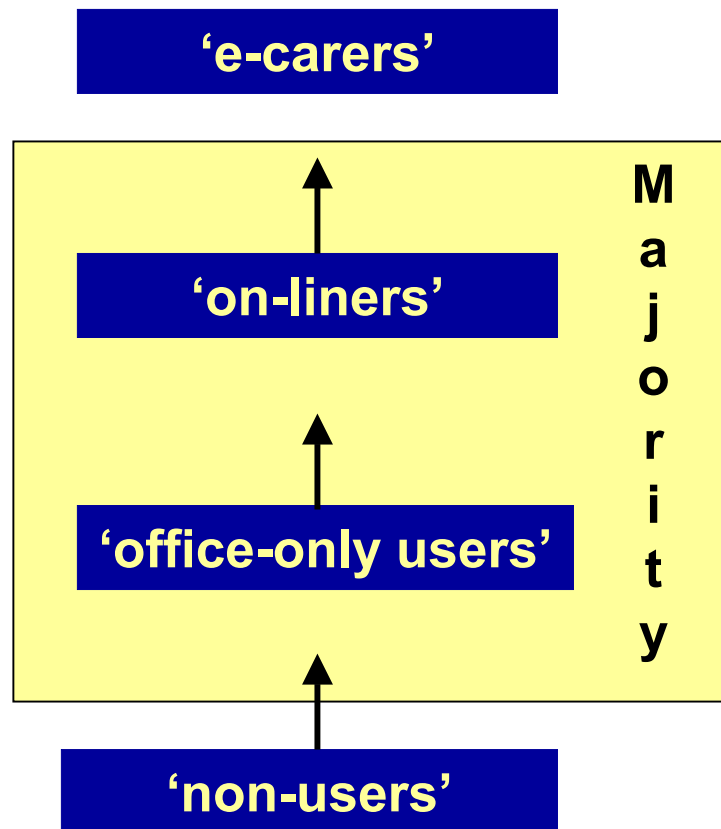
	Chronically ill citizens		All 50+ citizens
	percent [%]	absolute [million]	percent [%]
The experienced frontrunners	22%	17 m	31%
Old age beginners + technologically open minded	43%	32 m	42%
The digitally challenged	35%	26 m	27%

Source: SeniorWatch, 2002

Older European's interest in eHealth applications



Are European home care providers ready to utilise IST solutions ?



... utilise IST for the purpose delivering care to the client (e.g. mobile staff support, monitoring)

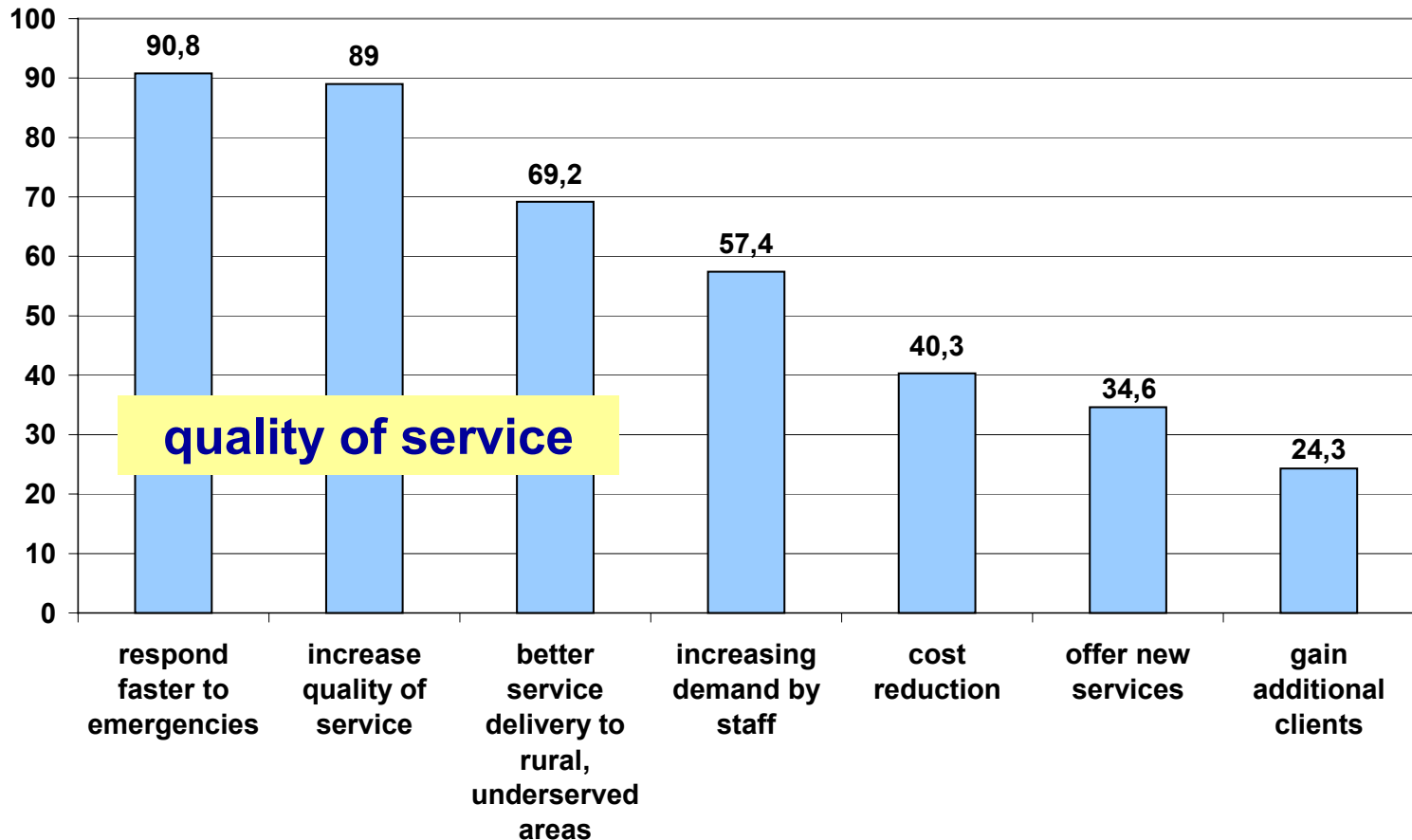
... maintain an Internet presence (not interactive)

... utilise IST (e.g. PC) for administrative purposes

... do not at all use IST (apart from fixed telephony)

Source: SeniorWatch, 2002

Motivation for equipping field staff with IST



Percentage base: Establishments that equip mobile workers with mobile phones, laptops or hand held computers, weighted according to European market share

Source: SeniorWatch, 2002

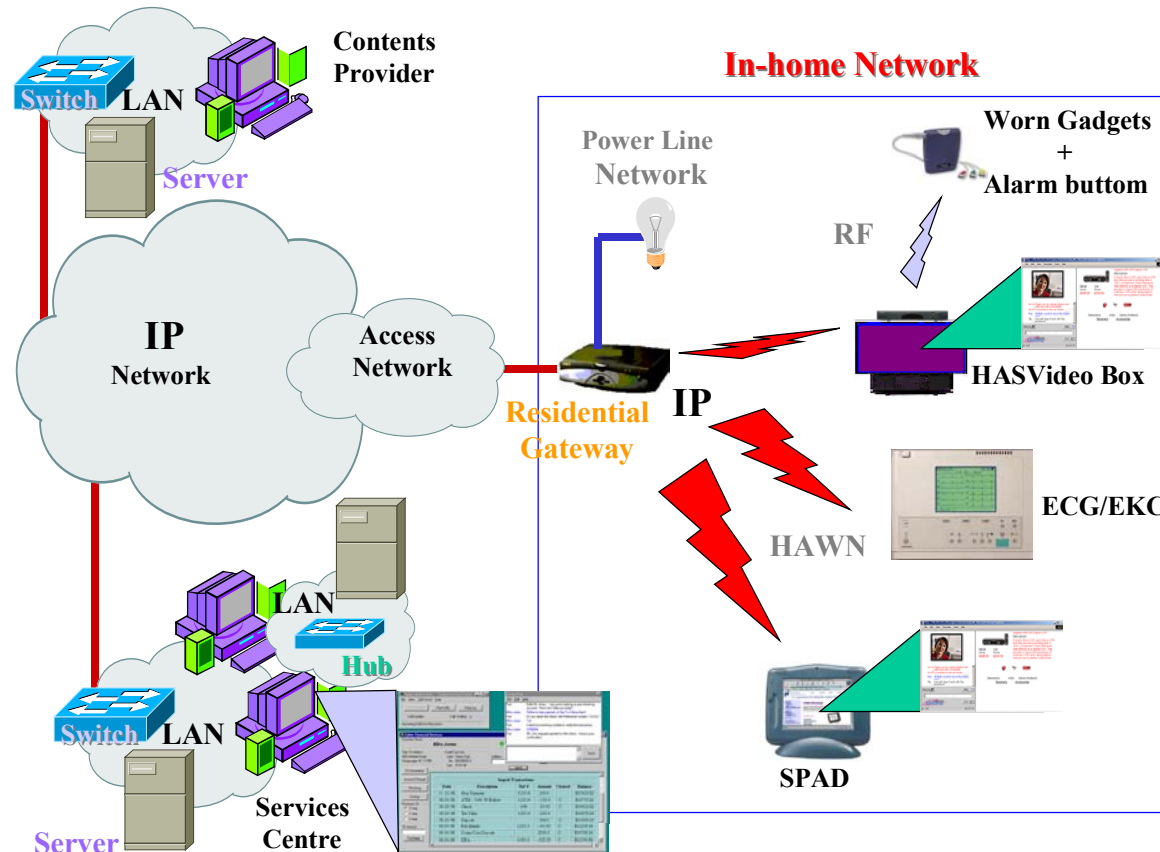
Challenge I: How can ICT solutions be brought into day-to-day home care practice ?

- On a pilot basis, user benefits have been proved many times. But where is the business case ?
- In many pilot projects, new ICT solutions have been developed in a specific context and on an 'ad-hoc' basis. But where to buy generic and scalable systems ?
- Considerable efforts have been made to develop reliable technology components. But where to buy plug-and-play solutions ?

Challenge II: How can potential demand be turned into actual demand ?

- Like any other age group, the older population covers the same range of IST involvement and relevant skills. But were can the 'digitally challenged' and the functional restricted obtain IST solutions that are easy to use/understand ?
- In general, older people take a very pragmatic approach with respect to utilising IST for their purpose. But how can they gain a better picture about the benefits IST solutions may hold for them ?

Challenge III: How to exploit converging technologies & services for the purpose of supporting independent living?



Source: IST@home, 2002

Thank you !

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