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

by

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ICADI - Preparatory Work Shop, London, 26th/27th June
Research context

**senior watch**

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

IST = Information Society Technologies

**TEN-HMS**

*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

<table>
<thead>
<tr>
<th>Disease</th>
<th>Age 50-59</th>
<th>60-69</th>
<th>70-79</th>
<th>80+</th>
</tr>
</thead>
<tbody>
<tr>
<td>High blood pressure</td>
<td>23.1</td>
<td>34.8</td>
<td>44.9</td>
<td>41.7</td>
</tr>
<tr>
<td>Heart disease</td>
<td>7.4</td>
<td>14.5</td>
<td>27.4</td>
<td>35.7</td>
</tr>
<tr>
<td>Chronic respiratory disease</td>
<td>5.4</td>
<td>8.8</td>
<td>11.5</td>
<td>11.4</td>
</tr>
<tr>
<td>Diabetes mellitus</td>
<td>6.8</td>
<td>9.4</td>
<td>12.2</td>
<td>10.1</td>
</tr>
<tr>
<td>Joint/bone/muscle diseases</td>
<td>18.9</td>
<td>27.0</td>
<td>30.3</td>
<td>35.2</td>
</tr>
<tr>
<td>Other long term condition</td>
<td>16.7</td>
<td>18.5</td>
<td>20.9</td>
<td>22.2</td>
</tr>
<tr>
<td>At least one chronic disease</td>
<td>49.0</td>
<td>64.2</td>
<td>73.4</td>
<td>74.0</td>
</tr>
</tbody>
</table>

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)

**The digitally challenged**
- Non-users
- Neither keen on learning nor wishing to improve computer skills

**The technologically open-minded**
- Non-users, but
- **Keen on learning** or wishing to improve computer skills

A generic typology of IST involvement

Source: SeniorWatch, 2002
Functional restriction often hinder full scale IST uptake

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

- Vision: 12% serious, 27% some difficulty
- Hearing: 5% serious, 26% some difficulty
- Dexterity: 10% serious, 19% some difficulty
- Either restrictions: 21% serious, 43% some difficulty

Source: SeniorWatch, 2002
## Market potential for IST-based solutions re the chronically ill

<table>
<thead>
<tr>
<th></th>
<th>Chronically ill citizens</th>
<th>All 50+ citizens</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>percent [%]</td>
<td>absolute [million]</td>
</tr>
<tr>
<td>The experienced frontrunners</td>
<td>22%</td>
<td>17 m</td>
</tr>
<tr>
<td>Old age beginners + technologically open minded</td>
<td>43%</td>
<td>32 m</td>
</tr>
<tr>
<td>The digitally challenged</td>
<td>35%</td>
<td>26 m</td>
</tr>
</tbody>
</table>

Source: SeniorWatch, 2002
Older European’s interest in eHealth applications

Source: SeniorWatch, 2002

- Internet health information
- Info about ongoing medical treatment
- Doctor’s advice by e-mail
- Doctor’s advice by video telephone

The experienced frontrunners
The old age beginners +
The technologically open minded
The digitally challenged

Source: SeniorWatch, 2002
Are European home care providers ready to utilise IST solutions?

- **‘e-carers’**: 
  - ... utilise IST for the purpose delivering care to the client (e.g. mobile staff support, monitoring)

- **‘on-liners’**: 
  - ... maintain an Internet presence (not interactive)

- **‘office-only users’**: 
  - ... utilise IST (e.g. PC) for administrative purposes

- **‘non-users’**: 
  - ... do not at all use IST (apart from fixed telephony)

Source: SeniorWatch, 2002
Motivation for equipping field staff with IST

Source: SeniorWatch, 2002

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

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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 where 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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