CHAPTER 2
USER NEEDS

2.1 Consumer Overview

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Introduction

It is obviously of vital importance to all decision makers in telecommunications to have some understanding of the current major demographic and social trends that will directly affect the type of services they need to be providing. It is not the intention here to give an in-depth demographic study, but more to review the different groups of disabled and elderly people and to point out the major current trends and their consequences for the telecommunications industry.

The Forgotten Consumers

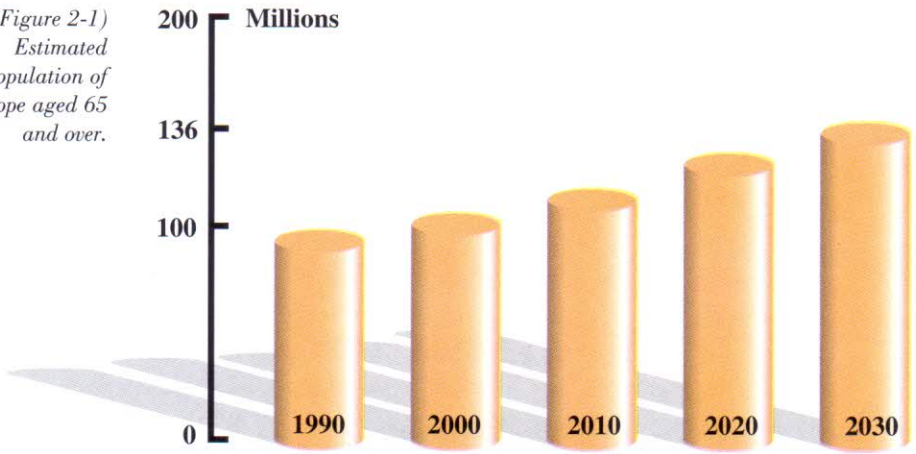
In geographic Europe alone, where the overall population is around 800 Million, there are currently about 100 million elderly people and 50 million people with a disability (this figure includes disabled people who are also elderly). The figures for the European Union are currently about 77 million elderly people and 43 million people with a disability (EUROSTAT, 1992). These are large numbers indeed and with the emergence of the single market and disappearance of the fragmented national markets, there is a unique opportunity

to design products at an affordable price for a part of the market that was previously difficult to reach.

With the ageing of the population in Europe, this figure is set to rise to an estimated 136 Million by the year 2030 as shown in Figure 2-1. There are of course differences in timing between the various European countries but the overall trend is valid for all countries. This ageing is clearly going to put considerable pressure on the health and social welfare systems, causing a growing and lasting demand for long-term care in old age. With all countries committed to the goal of care-in-the-community, or in other words, keeping elderly people for as long as possible in their usual social environment, there will be a growing role for all telecommunications services and in particular services such as telecare and telealarms.

The ageing of the population is being accompanied with an increase of technology awareness amongst this group of the population, as people who have been used to working and living with technical equipment, such as personal computers and audio-visual equipment, reach retirement age. It is nevertheless still important to design as user-friendly equipment as possible.

(Figure 2-1) Estimated population of Europe aged 65 and over.



Although there are wide variations in living conditions of elderly people within the European Union, the overall standard of living of elderly people, particularly the younger elderly (50-74), has risen broadly speaking in line with the overall standard of living of the population as a whole. There are however significant minorities, the size of which varies from country to country. For example, the proportion of elderly people living in poverty ranges from about 5% in Germany and Luxembourg to about 80% in Portugal. It is unlikely that these more or less significant minorities will be able to afford Assistive Technology (AT) products without funding from the social services. However, the prevailing view that elderly people do not in general have sufficient disposable income to spend on telecommunications services and products is certainly no longer true. The question is more now of providing services which really meet their needs and for which elderly people can perceive the need.

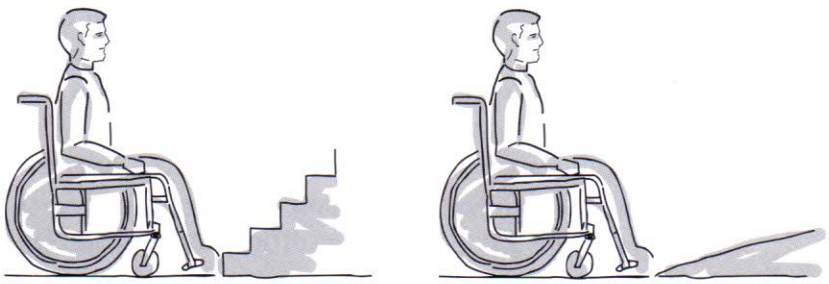
There has also been an increased feminization of poverty in old age (Knipscheer, 1994). This is in part due to the fact that women are less likely to have made full pension contributions and are more likely to live longer. This is reflected in figures showing that women make up about 60% of the population over 65. Another interesting point to note is about half the women over 65 are living alone as opposed to just 15% of men and there is an overall trend of an increasing proportion of elderly people living alone. Whilst there are variations between different European regions and in particular between the countries of the north and south of Europe, here again telecommunications has an ever increasing social role to play in all countries, reducing potential isolation and providing in some cases a lifeline to the outside world.

What is a Disability ?

There is often some confusion between the terms impairment, disability and handicap. In Figure 2-2 the

impairment could be the loss of use of the lower limbs which entails the disability of not being able to walk, whereas the handicap is a disadvantage created by the environment, a gap between personal capability and environmental demand (Verbrugge, 1994), which in this case is the stairs. The role of good design and technological solutions is to reduce the gap. This could be achieved in this particular situation by replacing the stairs with a ramp. An impairment doesn't therefore always lead to a handicapping situation and a handicap can also depend on a person's personality, attitude and opportunities.

(Figure 2-2) Wheelchair user facing a handicapping situation and potential solution.



It is estimated that about 12% of the population in the European Union suffer from a disability. There are some variations amongst the different countries, due in part to the different ways of collecting data and due also to the different definitions used to define each disability. Some countries are using the International Classification of Impairments, Disabilities and Handicaps (ICIDH) recommended by the World Health Organization (WHO), but there is a movement taken up by delegates at a human rights plenary meeting last October in the European Parliament to replace this strictly 'medical' definition of a disability with one that would recognize that a disabled person is "an individual in their own right placed in a disabling situation".

In relation to telematics and telecommunications this more functional approach of the definition would yield more helpful information about the number of people