



Setting Standards for
Retirement Communities

ProMatura
INTERNATIONAL

Research by ProMatura International

Housing, health and care

The health and wellbeing benefits of Retirement Communities



The largest and most in-depth survey ever conducted of UK Retirement Community residents and prospective residents has found that people that live in Retirement Communities are more likely to:

- ✓ Stay **healthier** for **longer**
- ✓ Enjoy life **more**
- ✓ Be **less** lonely
- ✓ Be **more** active
- ✓ Enjoy **more** privacy
- ✓ Have a **greater** sense of a safety net
- ✓ Feel **more** secure

Compared to people who have not yet moved into Retirement Communities.

The report also found that:

- ✓ 90% of residents thought they had moved into a Retirement Community at just the right time in their lives. 6% would rather they'd moved in sooner.
- ✓ 71% of residents saw moving into a Retirement Community as a chance to make new friends.
- ✓ Retirement Community residents feel more in control of their lives.
- ✓ By a wide margin residents of Retirement Communities believe that their lives are better now than they were a year ago.

Introduction

ProMatura conducted surveys of ARCO members' residents and prospective resident "sales leads" – hereafter referred to as non-residents.

A total of 2,799 surveys were completed by residents and 1,111 were completed by non-residents. Residents represented 81 communities from 15 operators.

This report is a distillation of some of the results and is intended as a first step in informing the debate about specialist housing-with-care for older people.

The full data and report is also available for purchase.

ARCO is committed to conducting further research in this field to help inform decision making by operators, investors, residents and policy makers. This will be available over the coming years through its ARCO Analytics service.

What is a Retirement Community?

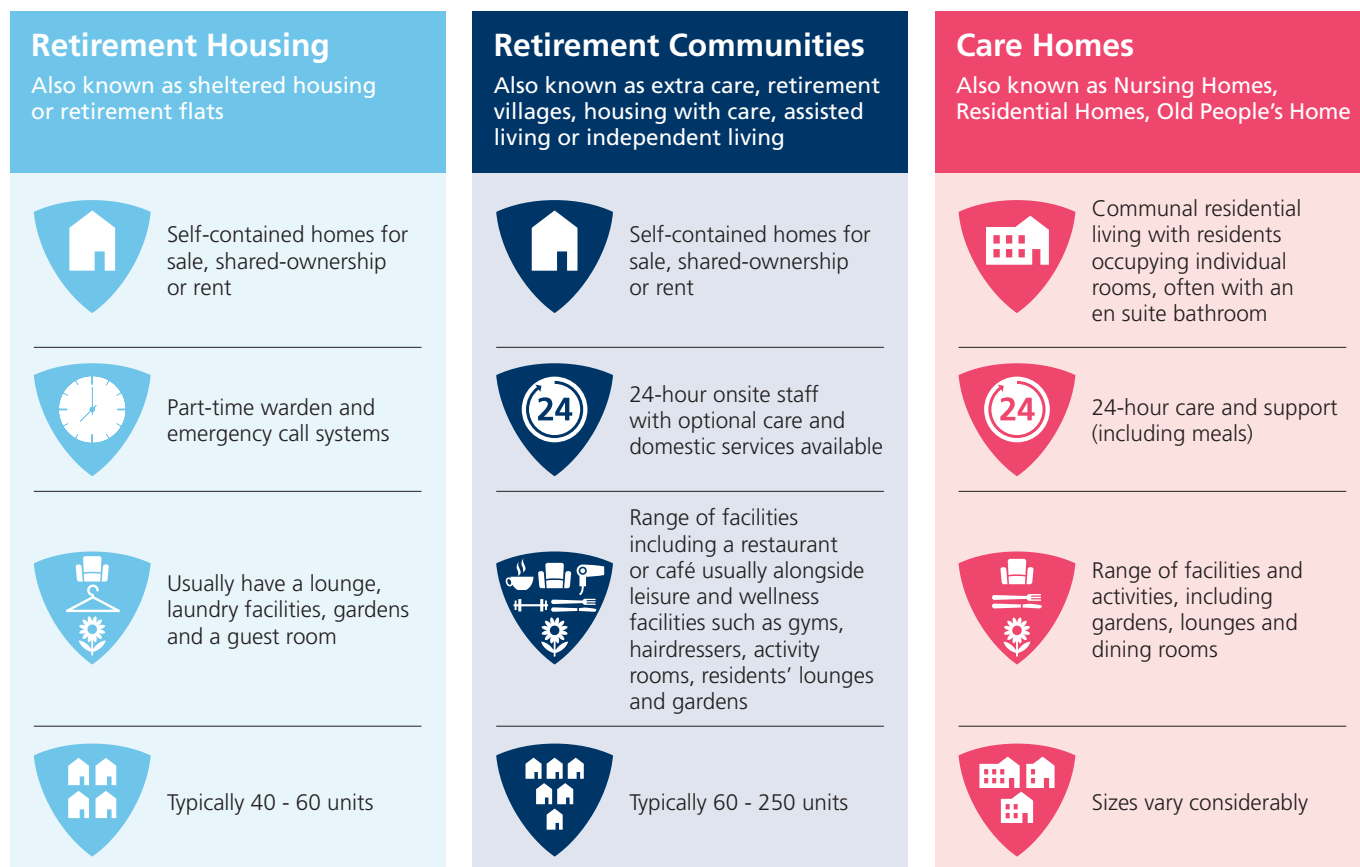
Retirement Communities combine housing with optional care and support services for older people. They allow residents to rent or own a property and to maintain their privacy and independence, with the reassurance of 24-hour on-site staff, communal facilities and optional care and support as needed.

Retirement Communities may also be referred to as retirement villages, extra care housing, housing-with-care, assisted living, close care apartments, or independent living settings.

They differ significantly from Care Homes or traditional retirement flats (see Image 1).

Image 1

Living Options for Older People



Why residents moved in

Having less need for property maintenance, access to communal facilities and availability of 24-hour support and domiciliary care on-site were the main reasons given for moving to a Retirement Community.

Chart 1

Feature	Positive or very positive
24-hour support availability	90%
Access to communal facilities	89%
Less need for property maintenance	89%
On-site domiciliary care available	88%

- Overall 90% of respondents reported that they moved to their community at just about the right time in their life (Chart 2)

Chart 2: Timing of Move to Current Community

- I moved here at just about the right time in life
90%
- I waited too late in life for this move
6%
- I moved here too early in life
4%



Healthier for longer

- Most residents (61%) reported their health was about the same since moving in, while 10% said their health had improved. The average age of respondents was 82.9 and respondents had lived in the community for an average of 4.5 years. Given the health decline expected as people age, it is noteworthy that so many felt that their health was the same or better since moving in (Chart 3).

Chart 3: Residents' Health Since Moving

- About the Same
61%
- Better
10%
- Worse
28%



Enjoy life more and are less lonely

- Overall satisfaction was high, with 89% of residents 'satisfied' or 'very satisfied' with their community (Chart 4).
- A significantly larger proportion of residents said that they 'often enjoyed life' in the past week compared to non-residents surveyed (70% vs. 48%).
- Residents were significantly more likely than non-residents to have enjoyed life and been happy, and were significantly less likely to have been lonely than non-residents during the week before they completed the survey.
- They were also more likely to be happy with their flat/house, the number of friends they have nearby and how often they see them – as well as having more of a sense of control over their lives (Chart 5).

Chart 4: Feelings During the Past Week

	You enjoyed life		You were happy		You were lonely	
	Residents	Non-res	Residents	Non-res	Residents	Non-res
Often	70%	48%	69%	49%	5%	12%
Some of the time	28%	44%	29%	44%	31%	36%
Hardly ever or never	2%	8%	2%	7%	64%	53%

Chart 5: Percent Very Satisfied with Attributes of their Current Residence by Survey Respondent Group

Attribute	Non-residents	Residents
My flat/house	19%	50%
The number of friends I have within the community (nearby for non-residents)	11%	27%
How often I see my friends	9%	15%
My sense of control over my daily life	27%	37%

More active

- Residents were from 2 to 5 times more likely than non-residents to be participating in a range of activities including social events, trying new activities, getting together with friends, eating with other people, exercising and spending time with family more frequently than they had in the past (Chart 6).

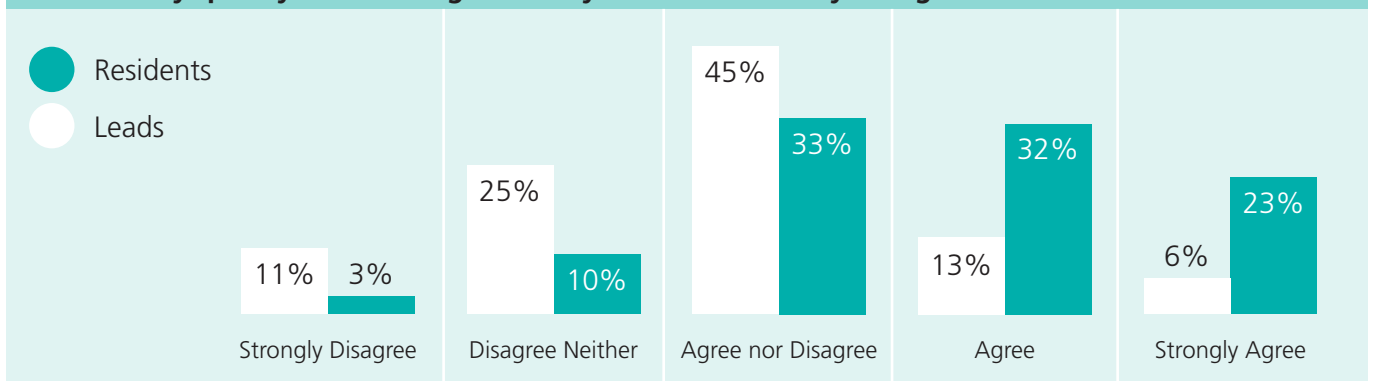
Chart 6

Activity	Non-residents report that they frequently or much more frequently...	Residents report that they frequently or much more frequently...
Participate in social events	11%	54%
Try new activities	13%	44%
Get together with friends	13%	42%
Eat with someone else	11%	36%
Exercise	17%	32%
Spend time with family	15%	31%

Higher quality of life

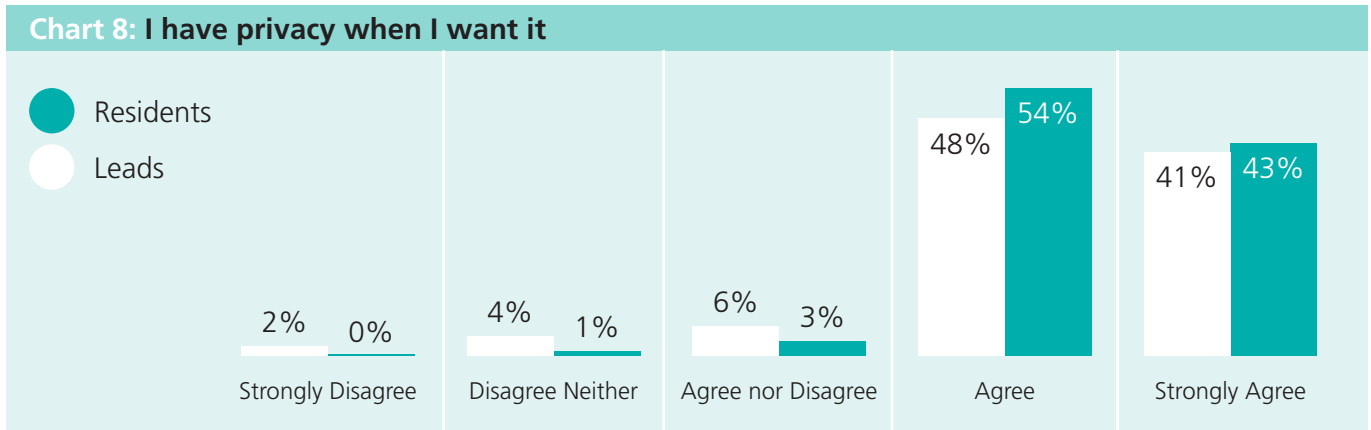
- A majority of residents (55%) agreed or strongly agreed that their quality of life was higher now than a year ago – four times as many of them said this as compared to non-residents – with non-residents actually being more likely to disagree or strongly disagree that their quality of life had improved (Chart 7).

Chart 7: My quality of life is higher today than it was one year ago



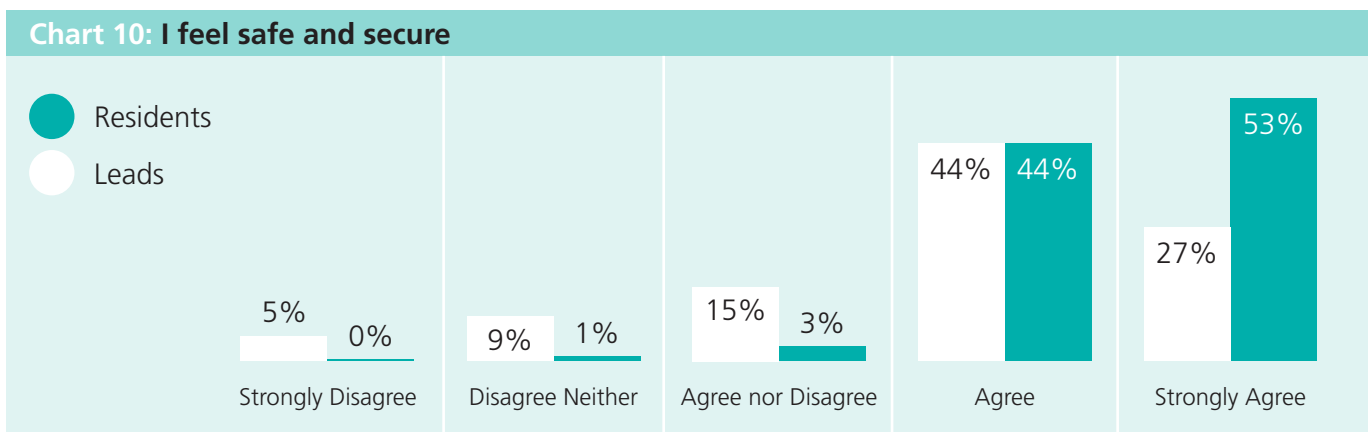
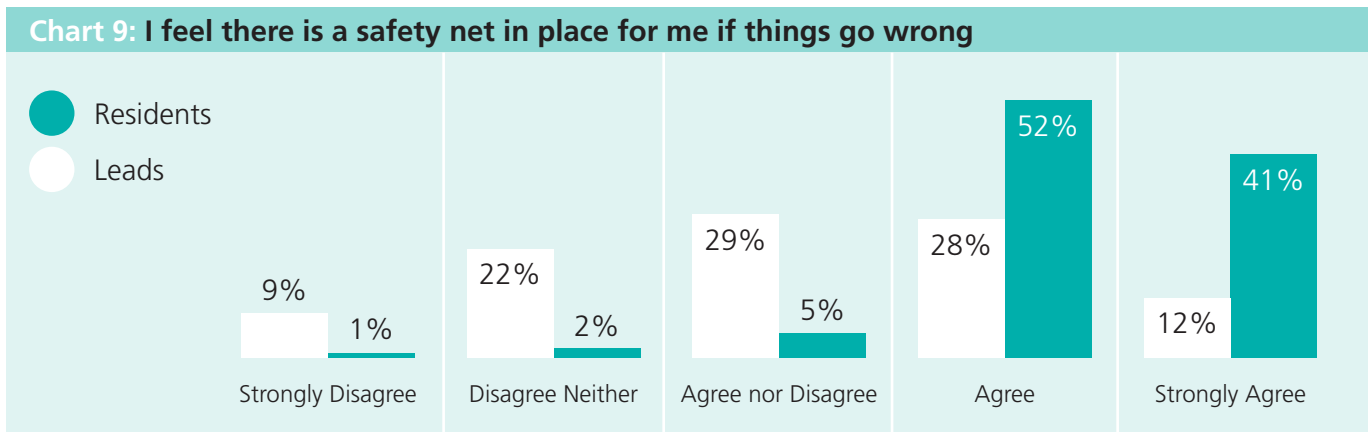
More privacy

- The vast majority of respondents (97%) agreed that they had privacy when they wanted it.
- Residents were also more likely than non-residents to agree that they have privacy when they want (Chart 8).



Safety net and security

- 93% of residents felt there was a safety net in place if things went wrong, as opposed to only 40% of non-residents (Chart 9).
- Residents were also twice as likely as non-residents to strongly agree that they feel safe and secure (Chart 10.)



Recommendations for action

The sector should:

- 1 Use these results as a starting point for further in-depth research to ensure that Retirement Community provision continues to put the needs of residents first and to deliver a great service.

Local Authorities should:

- 2 Undertake further research on the level of Retirement Community supply and demand in their areas.
- 3 Ensure that they have provisions in their local plans for Retirement Community housing.
- 4 Partner with specialist Housing Associations with expertise in extra care Retirement Communities to increase provision.

Opinion leaders should:

- 5 Re-evaluate assumptions about old age being a time of declining health and happiness.
- 6 Re-evaluate assumptions about the desirability of living in specialist housing-with-care for older people (which are often based on their own preferences rather than on data about what older people feel).

The Government should:

- 7 Develop a legal and regulatory framework for Retirement Communities to bring the UK into line with leading countries around the world.
- 8 Develop a clear definition for Retirement Communities and use clear terminology when referring to Retirement Communities and recognise the significant contribution they are making to our health and social care systems.
- 9 Provide more funding and land for affordable housing in Retirement Communities (often referred to as extra care).

Everyone should:

- 10 Plan ahead and make themselves aware of the options for later living, including Retirement Communities.



ARCO Members or Affiliates can purchase the report at discounted rate here: <https://www.arcouk.org/arco-analytics-reports>

Non-members can purchase the report here: <https://www.laingbuisson.com/shop/uk-retirement-communities-customer-insight-report-2019/>

Media and policy enquiries should be directed to:
Gareth Lyon ARCO's Head of Policy and Communications
garethlyon@arcouk.org

Associated Retirement Community Operators (ARCO)

The Heals Building, Suites A&B, 3rd Floor
22-24 Torrington Place, London WC1E 7HJ

Email: info@arcouk.org

Twitter: @ARCOTweets

For more information on ARCO, visit:

www.arcouk.org