



Setting Standards for
Retirement Communities

Housing in later life: improving choice by building a better offer

9 December 2021



Retirement Housing

Also known as sheltered housing, retirement flats or communities



Offers self-contained homes for sale, shared-ownership or rent.



Part-time warden and emergency call systems.
Typically no meals provided.

Typical facilities available:

- Communal lounge
- Gardens
- Laundry facilities
- Guest room



Typically 40 - 60 homes.



Integrated Retirement Communities

Also known as extra care, retirement villages, housing-with-care, assisted living or independent living



Offers self-contained homes for sale, shared-ownership or rent.



24-hour onsite staff.
Optional care or domiciliary services available.
Restaurant / Cafe available for meals.

Typical facilities available:

- Restaurant and Café
- Hairdressers
- Leisure Club including: gym, swimming pool, exercise class programme
- Gardens
- Communal lounge and/or Library
- Guest room
- Activity (Hobby) rooms
- Social event programme



Typically 60 - 250 homes.



Care Homes

Also known as Nursing Homes, Residential Homes, Old People's Home



Communal residential living with residents occupying individual rooms, often with an en-suite bathroom.



24-hour care and support.
Meals included.

Typical facilities available:

- Dining room
- Activities
- Communal lounges
- Gardens



Sizes vary considerably.



The case for name change

Consumers are confused..

Only 22% of older people are confident about the meaning of the term 'Retirement Community'*

..so are the public

51% of the public associate retirement housing with an 'Old People's Home' or 'Nursing Home'**

..and policy makers

'Which one are you?'

- Assisted Living?
- Close Care?
- Extra-Care Housing?
- Retirement Living?

*ARCO and Later Life Ambitions, 2020. 'Coming of Age: Better housing options for older people'. Available [here](#)

**Shakespeare Martineau, 2021. Retirement Housing: Marketing retirement housing as aspirational and not a sign of crisis. Available [here](#)



So we listened for change

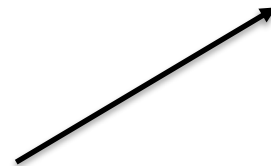
April 2021: ARCO conducted research into retirement living terminology



We listened to the views, aspirations and wishes of more than 1,500 older people, ARCO members and stakeholders

They told us:

'Integrated Retirement Community is the term we would like you to use to describe what you do'





Now it's time for change

Definition

Integrated Retirement Communities

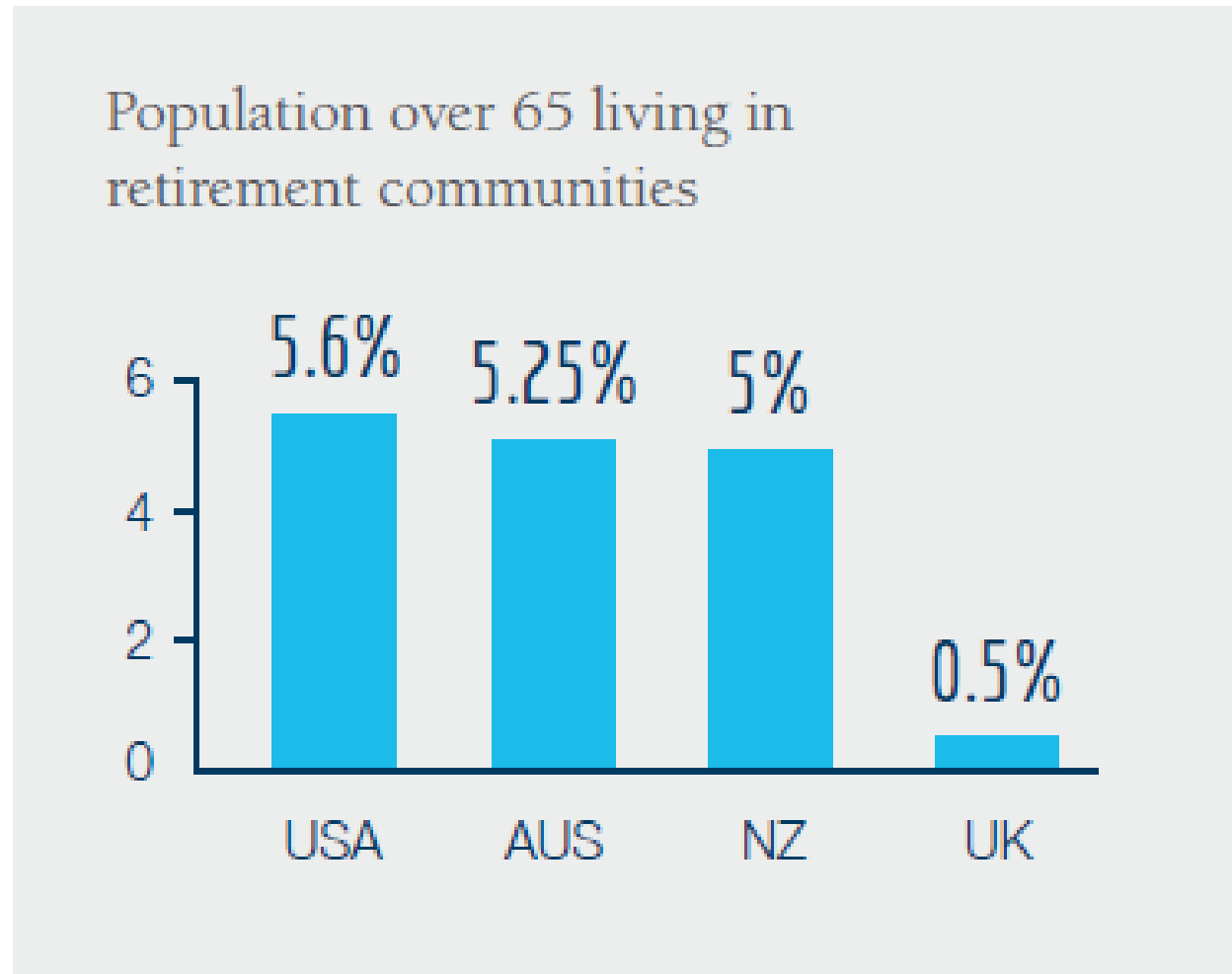
offer older people, the opportunity to live independently in their own home as part of a wider community.

Lifestyle, wellbeing and care services are available to support people's independence and aspirations

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Community

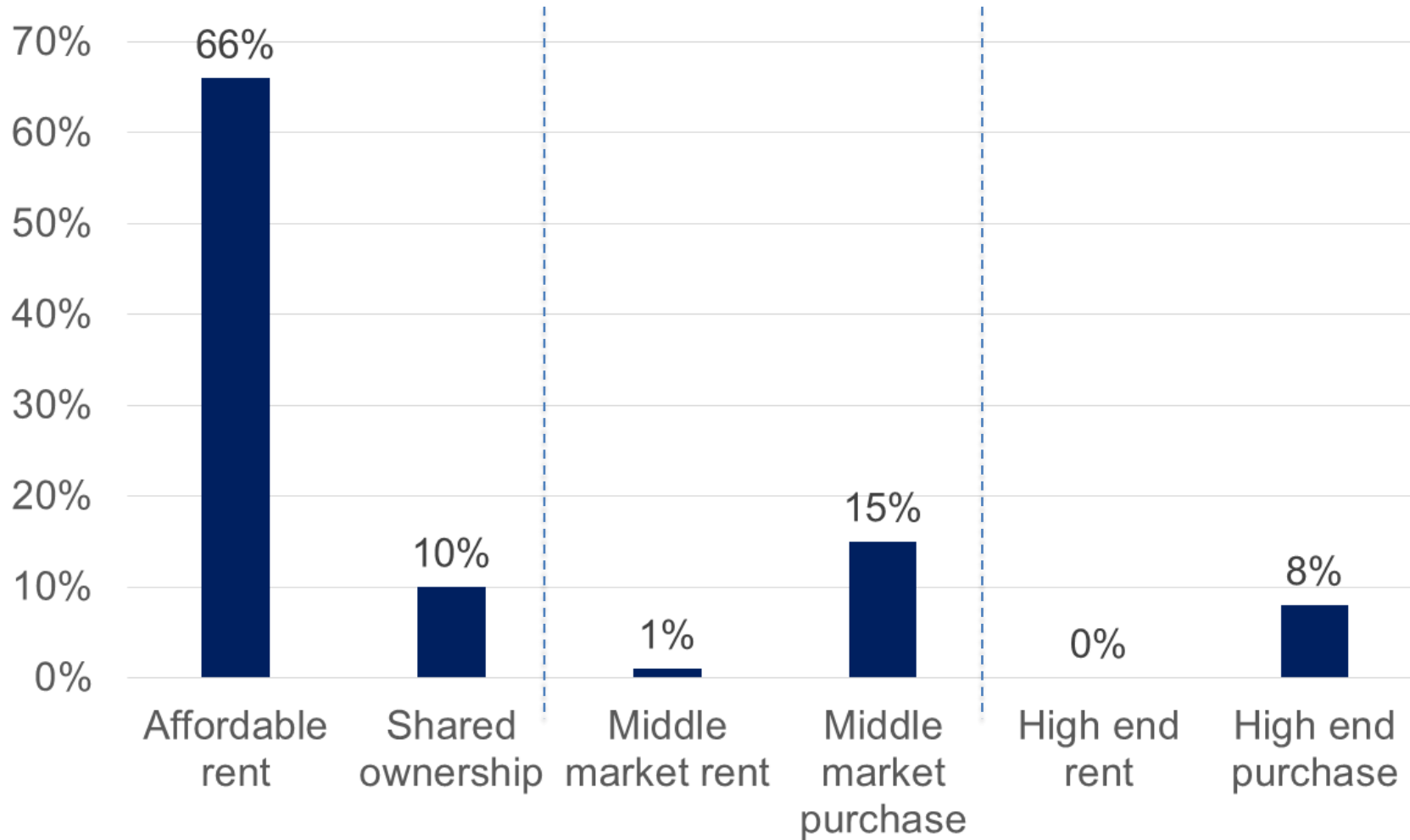


The housing-with-care market is underdeveloped



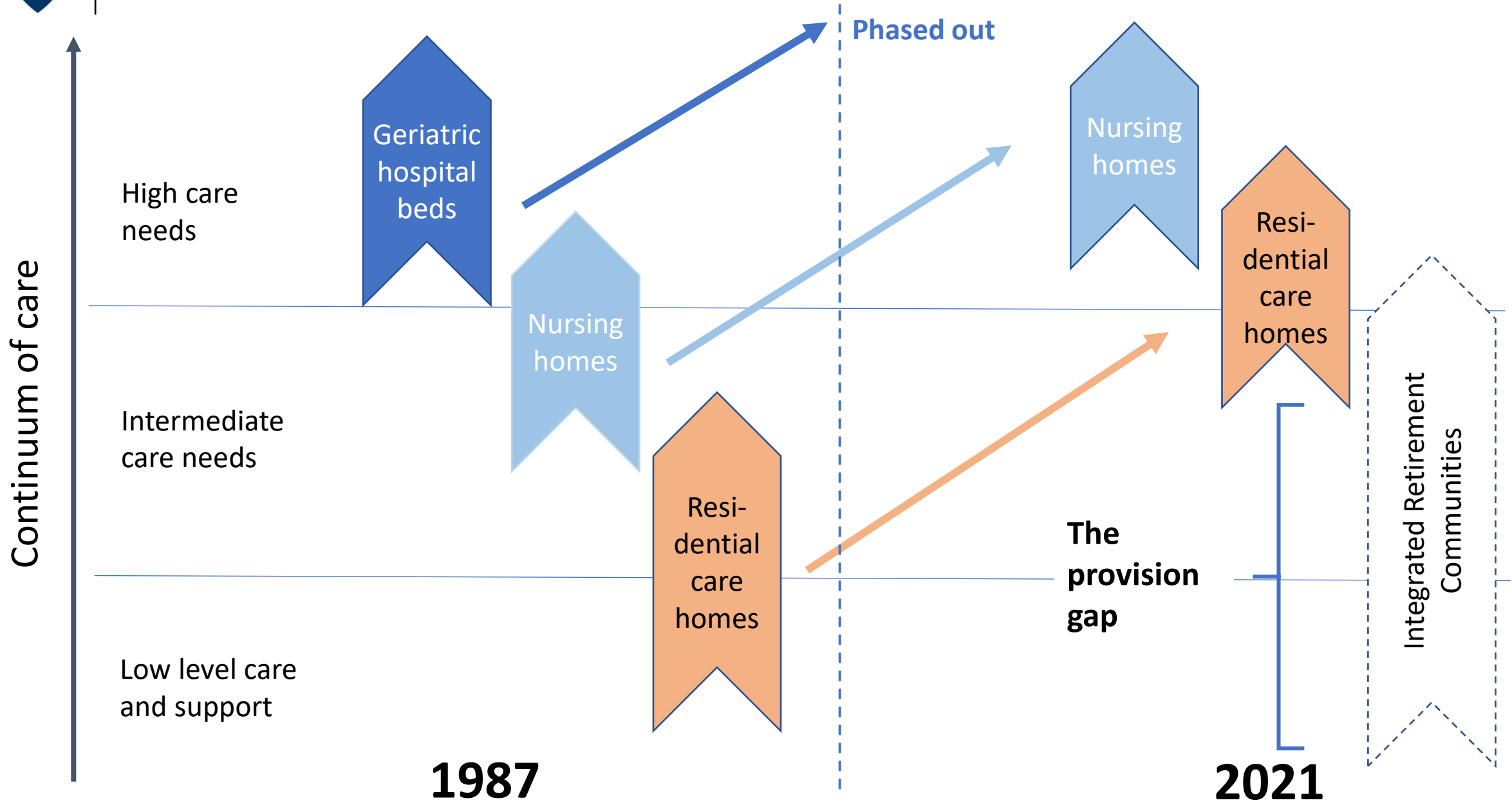


Shape of the housing with care sector for older people





The provision gap: The changing continuum of care and support





Housing with care vs care homes and sheltered housing






Housing-with-care in the UK is still a relatively new concept, and supply is very limited compared to other specialist housing or care options for older people.

Care home beds	456,000
Housing-with-care units	70,000
Sheltered/retirement housing units	444,000



Largest home builders in NZ

Top NZ residential builds

	Company	Projects	Value of projects	Average value of projects
	1 Ryman Healthcare Ltd	39	\$899m	\$23m
	2 Fletcher Construction	264	\$867m	\$3.2m
	3 G J Gardner Homes	975	\$839m	\$861,000
	4 Changda Construction	10	\$744m	\$74m
	5 Summerset Management Group LTD	37	\$741m	\$20m
	6 Metlifecare Ltd (AKL)	25	\$679m	\$27m
	7 Mike Greer Homes	389	\$547m	\$1.4m
	8 Classic Builders Ltd	338	\$505m	\$1.4m
	9 Oceania Group Ltd	18	\$381m	\$21m
	10 CMP Construction Ltd	4	\$349m	\$87m
	11 Universal Homes Ltd	111	\$337m	\$3m
	12 Arvida Group	14	\$321m	\$22.9m
	13 Generation Homes	127	\$301m	\$2.3m
	14 Haydn & Rollett Construction	8	\$293m	\$36.6m
	15 Jennian Homes	298	\$276m	\$930,000

Source: Pacifecon Building Intelligence







Aligning business models with international best practice

- Move away from housebuilder model to operational real estate
- Enables design of more aspirational facilities
- Provides cost certainty for consumers by sharing/taking on risks

Housing-with-care: Filling the policy void

Sector-specific regulation has aided growth in other countries – in the UK, housing-with-care is non-existent in policy terms.

<p>New Zealand</p> 	<p>Australia</p> 	<p>United States</p> 	<p>UK</p> 
<p>Retirement Villages Act 2003</p> <p><i>5.5% of over-65s live in a Retirement Community</i></p>	<p>State-based (e.g. Retirement Villages Act New South Wales 1999)</p> <p><i>5% of over-65s live in a Retirement Community</i></p>	<p>State-based (e.g. Continuing Care Retirement Communities Act in North Carolina)</p> <p><i>6% of over-65s live in a Retirement Community</i></p>	<p>No sector-specific regulation in the UK</p> <p><i>0.6% of over-65s live in a Retirement Community</i></p>



The Housing-with-Care Task Force

The Housing-with-Care Task Force: Bringing together key stakeholders

Housing-with-care straddles a range of Government departments. Growing the housing-with-care sector at this critical post-Covid-19 juncture requires a collaborative Task Force which brings together different policy areas.





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www.arcouk.org

The Housing-with-Care Task Force

- Reducing the need for institutional care
- Keeping people healthy and out of hospital
- Freeing up homes for people of all ages
- Securing investment in the UK's social care infrastructure
- Providing high quality care services
- Tackling the loneliness epidemic by boosting social connection



VISION2030

in **six** key numbers

- 1 Currently about **75,000** people live in Retirement Communities
- 2 In the next 30 years the number of over 75s in the UK will **DOUBLE**
- 3 Our sector's vision is to provide for **250,000** people by 2030
- 4 In achieving this our sector's turnover will be over **£70bn** until 2030 and we'll need to invest £40bn by then
- 5 This will deliver **£5.6bn** savings for the UK's health and social care systems until 2030
- 6 And release over **562,500** bedrooms into the general housing market

