



Setting Standards for  
Retirement Communities

# Integrated Retirement Communities in the UK

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Setting Standards for  
Retirement Communities

[www.arcouk.org](http://www.arcouk.org)

# About ARCO and Integrated Retirement Communities

Expanding choice and options between care at home and care homes for older people

## About ARCO
















**41** Members, spanning  
not-for-profit  
and private operators

**80** Affiliate  
organisations

Providing services to approximately  
**30,000** older people



## Where do IRCs sit?

 <b>Retirement Housing</b> Also known as sheltered housing or retirement flats	 <b>Integrated Retirement Communities</b> Also known as extra care, retirement villages, Housing-with-Care, assisted living or independent living	 <b>Care Homes</b> Also known as Nursing Homes, Residential Homes, Old People's Home
 <p>Self-contained homes for sale, shared-ownership or rent</p>	 <p>Self-contained homes for sale, shared-ownership or rent</p>	 <p>Communal residential living with residents occupying individual rooms, often with an en suite bathroom</p>
 <p>Part-time warden and emergency call systems</p>	 <p>24-hour onsite staff with optional care and domestic services available</p>	 <p>24-hour care and support (including meals)</p>
 <p>Usually have a lounge, laundry facilities, gardens and a guest room</p>	 <p>Range of facilities including a restaurant or café usually alongside leisure and wellness facilities such as gyms, hairdressers, activity rooms, residents' lounges and gardens</p>	 <p>Range of facilities and activities, including gardens, lounges and dining rooms</p>
 <p>Typically 40 - 60 units</p>	 <p>Typically 60 - 250 units</p>	 <p>Sizes vary considerably</p>



# The current care landscape in the UK

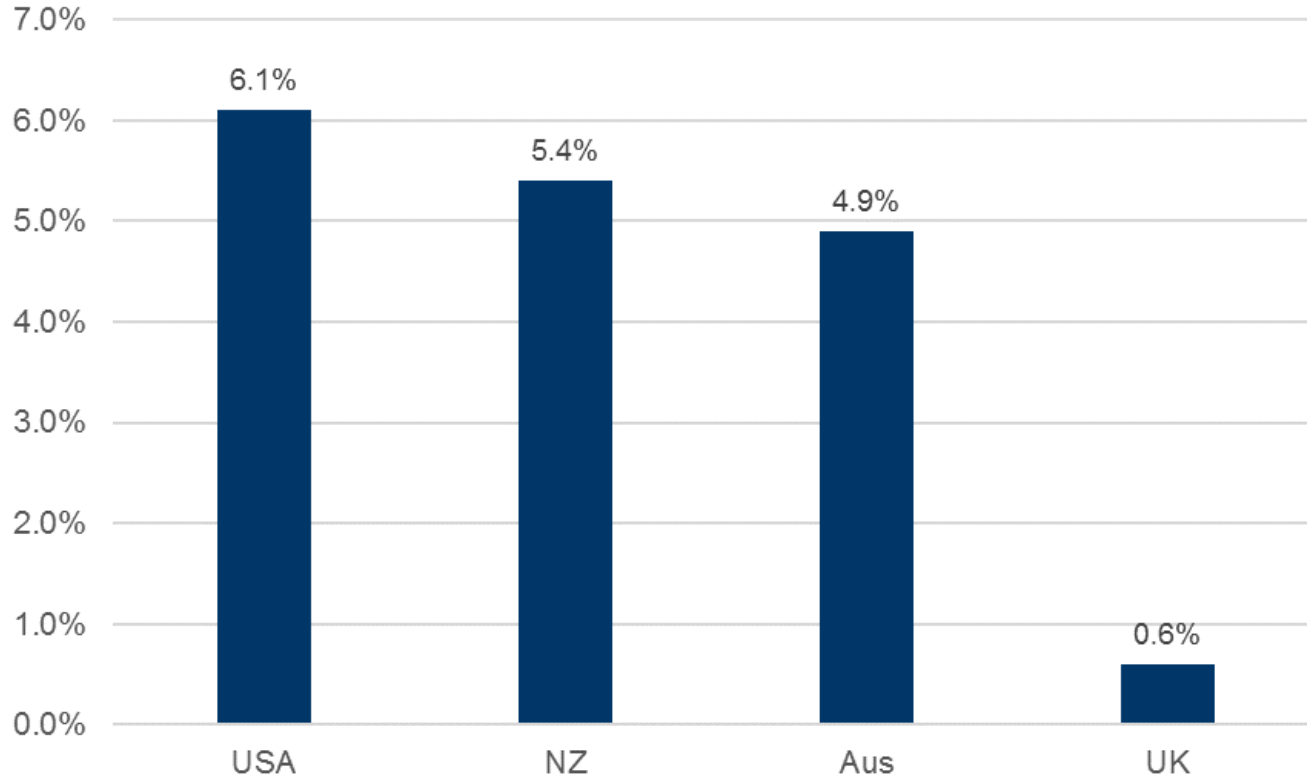
Housing-with-care in the UK is still a relatively new concept, and supply is very limited compared to other specialist housing or care options for older people.



+ approx. 1m people receiving home care services



## Population over 65 living in IRCs



## HERE ARE THE TOP 10 FINDINGS

1

**NHS COSTS**  **REDUCE BY 38%**

The ExtraCare Charitable Trust model can result in significant savings for NHS budgets – over a 12 month period total NHS costs (including GP visits, practice and district nurse visits and hospital appointments and admissions) reduce by 38% for ExtraCare residents in the sample across the period.

2

**UNPLANNED HOSPITAL STAYS REDUCED** 

**FROM 8-14 DAYS TO 1-2 DAYS** 

The ExtraCare Charitable Trust model is associated with a significant reduction in the duration of unplanned hospital stays, from an average of between 8-14 days to 1-2 days, promoting the efficient use of hospital beds.

3

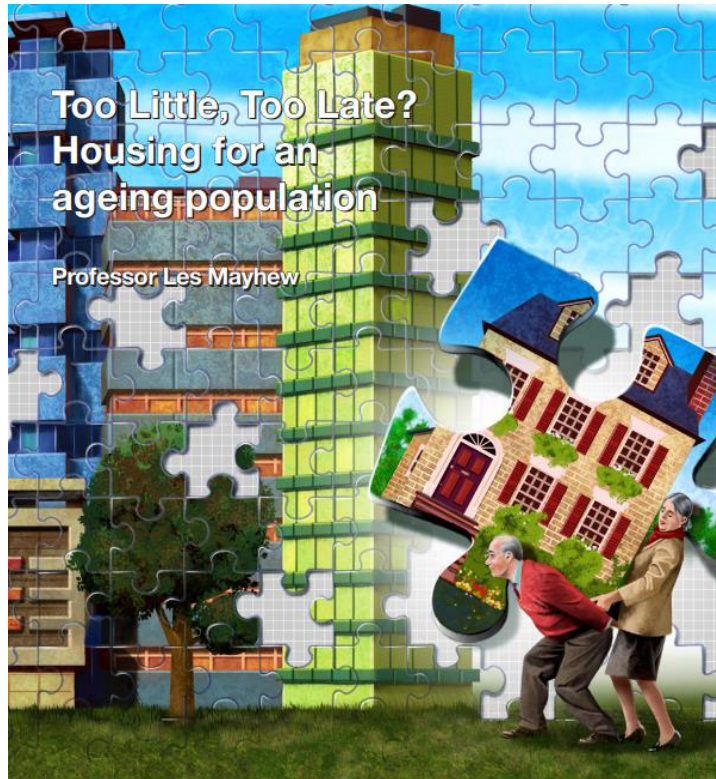


**46% REDUCTION IN ROUTINE AND REGULAR GP VISITS**

The ExtraCare Well-being Service provides accessible, informal (drop-in) support, offering preventative healthcare and ongoing day-to-day chronic illness care. ExtraCare residents used their GP more than the control sample at 3 and 12 months due to their relatively poorer health. During the 12 month period ExtraCare residents' routine and planned GP appointments reduced by 46% whilst drop-ins to the Well-being Service increased. Whilst this is not directly related at an individual level it does strongly support the drop-in Well-being model.



# Helping solve the housing crisis



ilc...

The Mayhew Review

## Future-proofing retirement living

Easing the care and housing crises



Health and Care  
Community  
Prevention  
International  
Inequalities  
Life expectancy  
Economy  
Finance and Wealth

Full report



# Delivering care to a high-quality



## Putting the 'care' in Housing-with-Care

Integrated Retirement Communities:  
improving care quality and tackling the workforce crisis



## High quality onsite domiciliary care services

Percentage of domiciliary care agencies run by ARCO members in Integrated Retirement Communities rated as Good or Outstanding by CQC

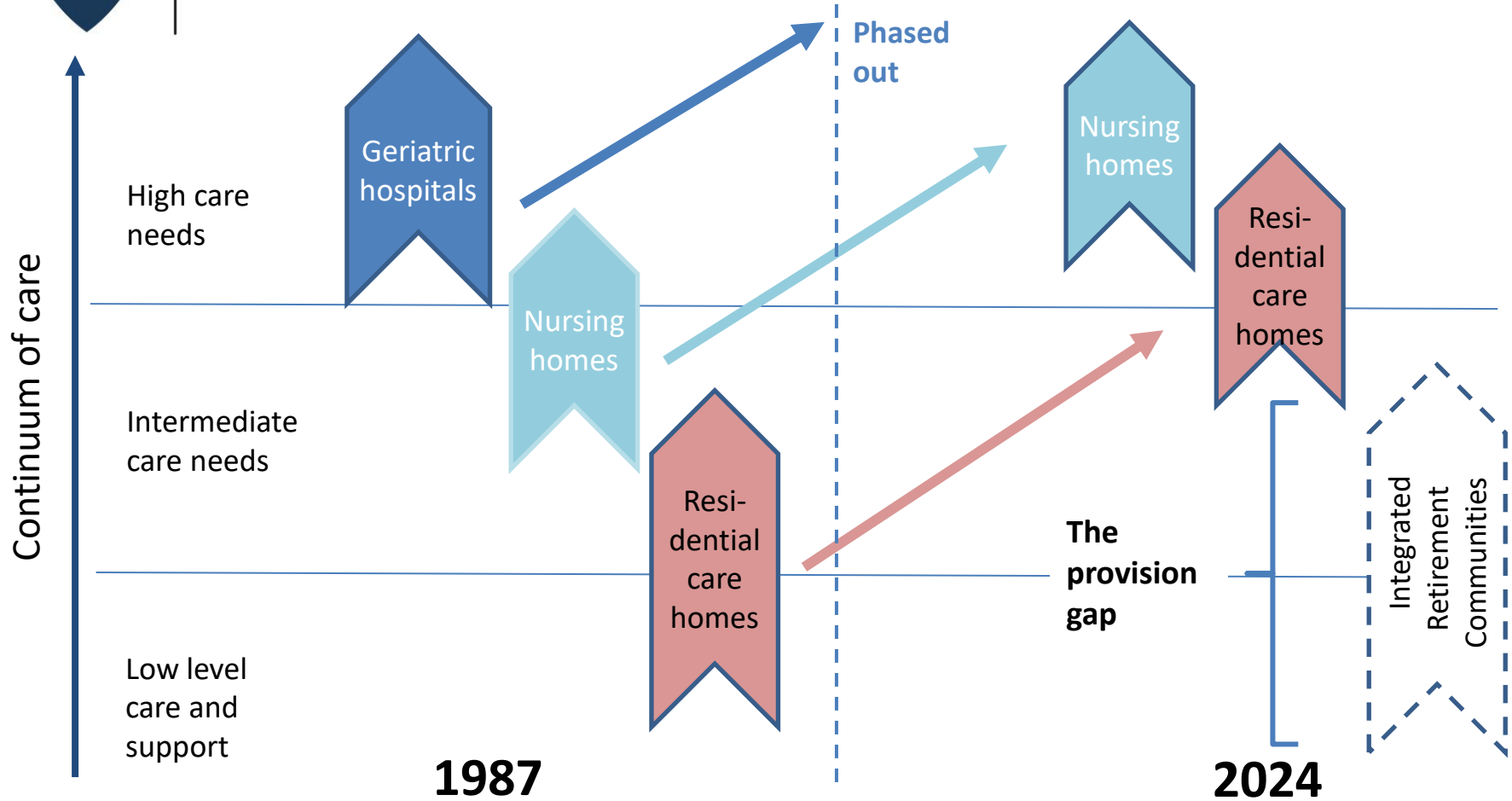
**97%**

Percentage of all CQC registered domiciliary care agencies in all settings rated Good or Outstanding

**88%**



# The provision gap: The changing continuum of care and support



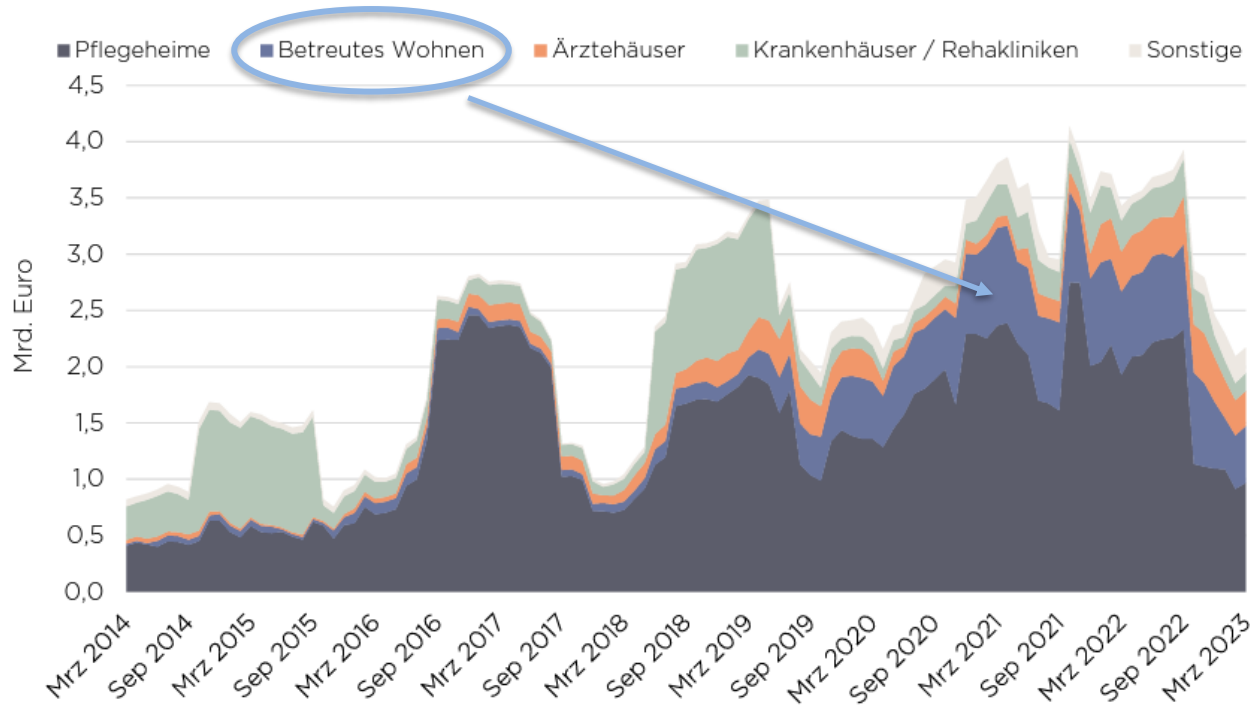


## Part of a global conversation



# Part of a global conversation

Abb. 1: Transaktionsvolumen Deutschland (letzte 12 Monate rollierend)





## The current care landscape in the UK

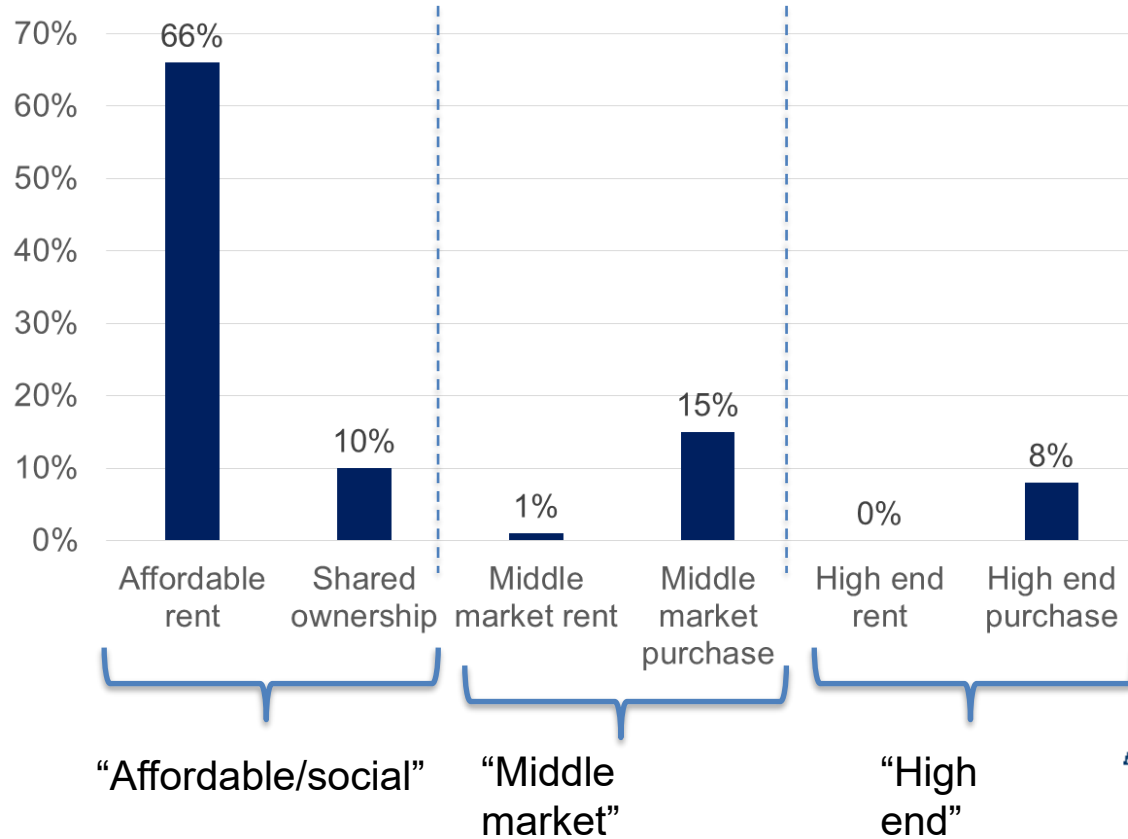
Housing-with-care in the UK is still a relatively new concept, and supply is very limited compared to other specialist housing or care options for older people.

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

+ approx. 1m people receiving home care services



# Shape of the sector











Village Apartments

Village Centre

Care Bedrooms

Gardens

Restaurant

Village Apartments

Village Apartments

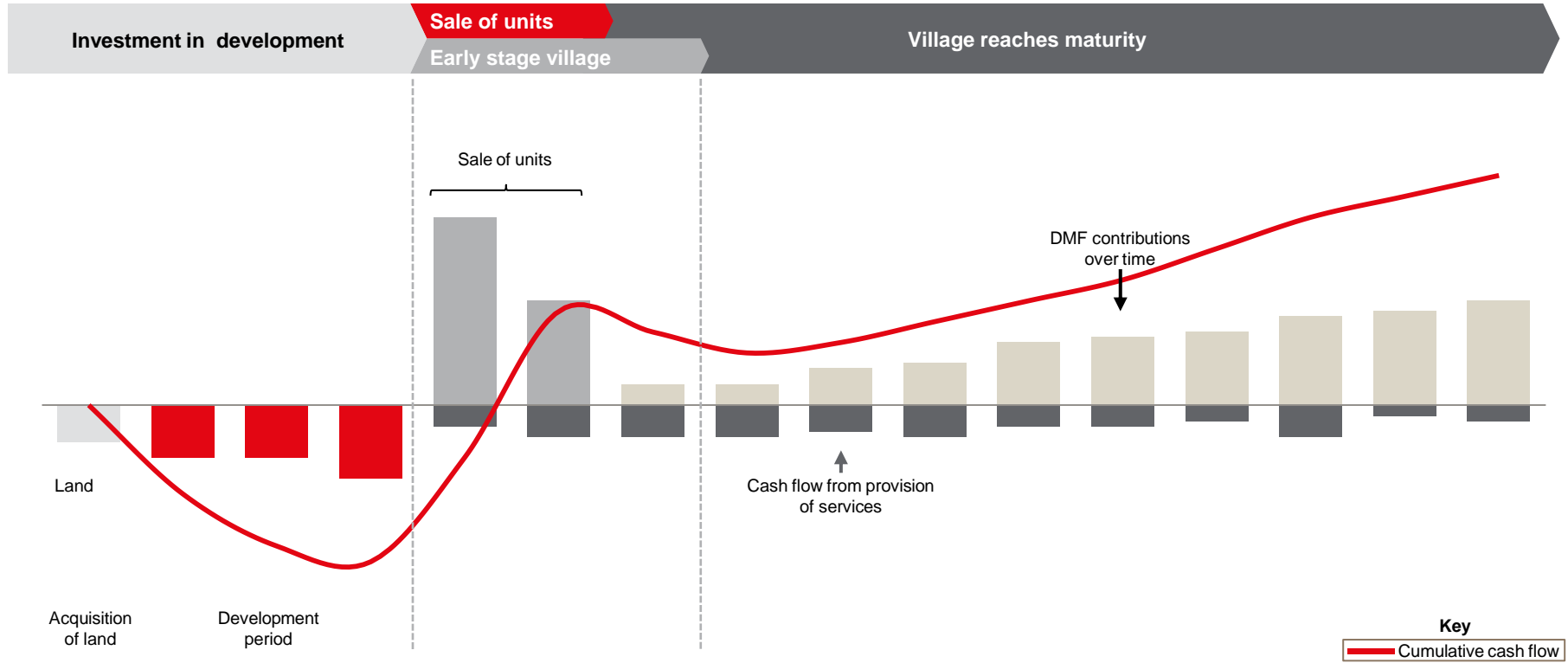
Village Apartments





DEBBY

# Typical village return over time





# International comparisons

## New Zealand



Retirement Villages Act 2003

**5.5%** of over-65s live in an Integrated Retirement Community

## Australia



State-based (e.g. Retirement Villages Act New South Wales 1999)

**5%** of over-65s live in an Integrated Retirement Community

## United States



State-based (e.g. Continuing Care Retirement Communities Act in North Carolina)

**6%** of over-65s live in an Integrated Retirement Community

## UK



No sector-specific regulation in the UK

**0.6%** of over-65s live in an Integrated Retirement Community



# Setting the agenda



“A new Task Force will be launched shortly to look at ways better choice, quality and security of housing for older people can be provided.”



ARCOtweets  
@ARCOtweets

Housing Minister [@lucyfrazernp](#) confirms in the Commons this afternoon that she is committed to launching the Older People's Housing Task Force and has spoken to Care Minister [@Helen\\_Whately](#) about it.

Thanks [@BobBlackman](#) for continuing to raise awareness of this vital issue.





## Summary

- Provision still lags behind other countries, but market is growing
- IRCs attracting majority of investment and growth
- Political support for the model
- Growth likely to continue, particularly in mid-market and high end (rental and for-sale)