



Retirement Communities Consumer Insights 2025

‘More than a feeling’ – Wellness presentation
Ageing Australia National Conference 2025



“Great survey. I’m going to really have to think through these issues more closely now” – Male, 65 - 70

The Catalyst Report (and me)

- Personal details
 - Grew up in Sydney, then moved to Albany WA in 2012
 - Brewing beer, singing in musicals, cricket tragic
 - Parents in AdventistCare in Wahroonga, Sydney
- First market research interview in 1982
- Started Catalyst Research in 1998
- Founded *The Catalyst Report* in 2017 - now three annual market studies
 - Home Care - Feb survey / March report
 - Retirement Communities - June survey / July report
 - Resi Aged Care - October survey / November report
- Large scale consumer surveys generating insights to support provider decision making
 - Strategy, development, pricing, marketing, sales, operations, client experience, innovation
- 94 providers have accessed our reports or data products, mostly repeat subscribers



More than a feeling

Wellness is a thing!

Wellness - good for residents

Wellness - good for business

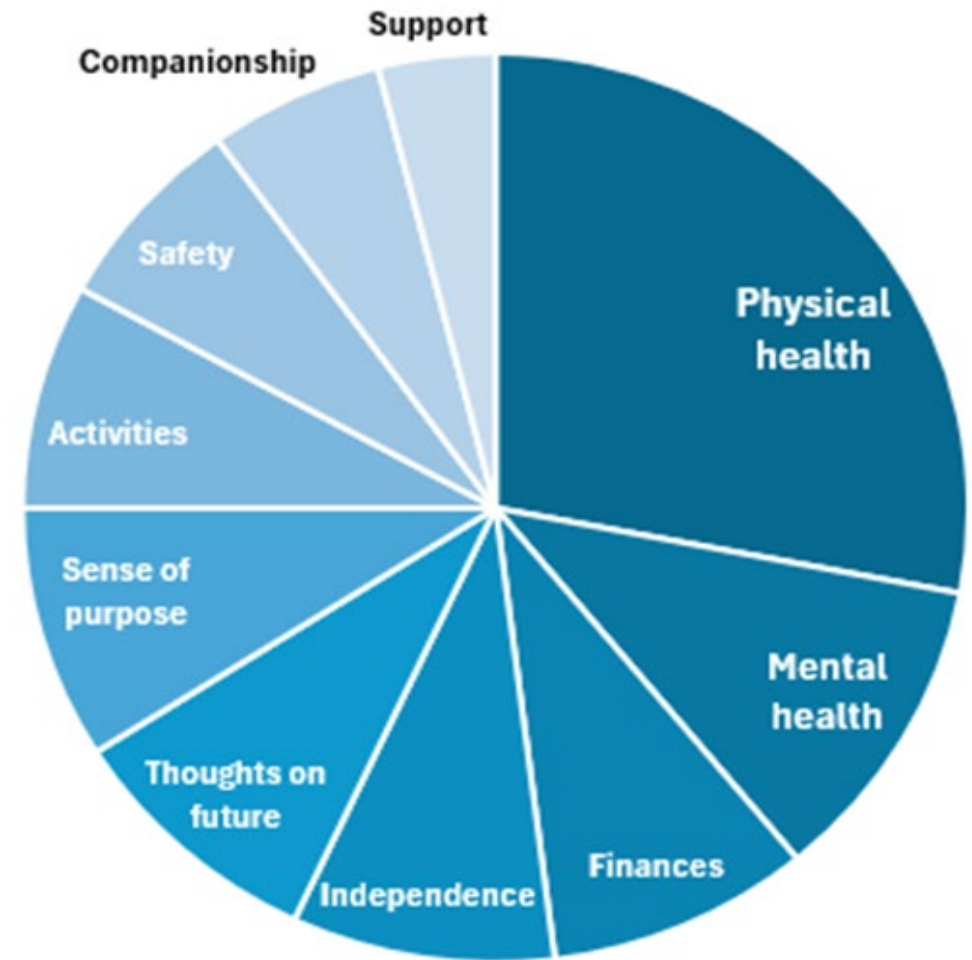
Wellness - good for your brand



Catalyst Wellness index – 2023 study

Catalyst Wellness Index - overview

- 12,000+ respondents rated their quality of life on 10 wellness elements
 - Health – your physical wellbeing
 - Companionship – people to engage with
 - Activities – having things to do
 - Your finances
 - Independence – freedom to do what you want
 - Feeling safe
 - Feelings or thoughts about the future
 - Access to support – people to assist when you need help
 - Having a sense of purpose
 - Health – your mental wellbeing
- The scale was 0 Very poor 10 Excellent
- Adding averages for 10 elements gives score out of 100 = Wellness Index
- Key driver analysis explains 86% of overall Wellness (a very strong model)
- Analysis compares Wellness by age, sex, residential status and financial comfo



Wellness key drivers

Catalyst Wellness Index (Home & Finance)

How would you rate your quality of life in terms of the following?

	Everyone	RL Resident	Never downsizing	Have Downsized	Might Downsize	Renting	Struggling	Getting by	Comfortable
Independence - having the freedom to do what you want	7.9	8.4	8.3	8.3	7.9	7.0	7.3	8.5	9.0
Feeling safe	7.7	8.5	7.9	7.9	7.6	6.8	7.2	8.3	8.9
Activities - having things to do	7.4	8.1	7.8	7.7	7.5	6.4	7.0	8.0	8.6
Health - your mental wellbeing	7.3	7.9	7.9	7.8	7.5	6.5	7.0	8.0	8.5
Companionship - having people to engage with	7.2	8.0	7.5	7.5	7.3	6.1	6.8	7.9	8.4
Having a sense of purpose	7.1	7.6	7.6	7.4	7.2	6.2	6.7	7.7	8.2
Health - your physical wellbeing	6.9	7.2	7.1	7.2	7.0	5.9	6.4	7.4	7.9
Access to support - people to assist when you need help	6.8	7.6	7.2	7.0	6.6	6.0	6.2	7.4	8.1
Feelings or thoughts about the future	6.7	7.2	7.2	7.0	6.7	5.4	6.0	7.3	8.0
Your finances	6.4	7.1	7.1	6.9	6.7	4.4	4.9	7.6	9.1
Catalyst Wellness Index	71.3	77.5	75.6	74.8	72.1	60.8	65.5	78.1	84.7




- RL = more a positive quality of life, ahead of downsizers. Those renting have the lowest Wellness rating
- RL = feeling safe, companionship and access to support
- Money does buy quality of life

2024 Retirement Communities market study

About the 2025 Retirement Communities study




- Online survey conducted during **June/July 2025**
- Input from industry providers assisted in questionnaire development
- Respondents via National Seniors, Resident Associations and market research panelists

Personas

-  *Residents* – Current residents of Retirement village or Lifestyle community
-  *Shoppers* – Researching now or available to consider Retirement Living
-  *Rejectors* – Would not consider Retirement Village or Lifestyle community living



Resident/Shopper segments – self nominated as a shopper or resident

-  *Lifestyle Community* – resort style facilities with a strong focus on social activities. No care options offered
-  *Independent Living* – traditional retirement community with social activities and some leisure facilities; low care options available
-  *Assisted Living* – retirement community offering care and support services. Some social and basic leisure facilities

Some Shoppers nominated in more than one segment.

The Sample



Sex	Count
Female	7,640
Male	5,380
Total	13,020

Age Group	Count
Under 66	3,377
66 to 70	2,098
71 to 75	2,635
76 to 80	2,555
Over 80	2,355

State	Count
NSW / ACT	3,452
Vic / Tas	2,722
Qld	3,769
WA	1,384
SA	1,693

Personas	Count
Resident	3,711
Shopper	3,824
Rejector	5,485

Financial Comfort	Count
Struggling	1,090
Getting by	3,640
Comfortable	6,386
Well off	1,555

Location	Count
Metro	9,093
Regional	1,331
Rural/Remote	2,596

Marital Status	Count
Married	7,710
Divorced	2,170
Never married	935
Widowed	2,075

Shopper Segment	Count
Lifestyle Seeker	1,575
Independent Living	2,274
Assisted Living	665

Status	Count
Working full time	1,189
Working part time / casually	1,556
Part pension	2,721
Full pension	3,608
Self funded retiree	4,322
Rental assistance recipient	638

Living Arrangement	Count
Living in home (owned or mortgage)	7,767
Living in retirement / lifestyle village	3,711
Renting	992
Living with other family members	238

Survey flow

Topic	Shopper	Resident
Consumer Sentiment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Triggers for change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contracts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Research / information sources	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Expectations / Preferences	<input checked="" type="checkbox"/>	
Purchase Journey		<input checked="" type="checkbox"/>
Benefits and Barriers	<input checked="" type="checkbox"/>	
Resident experience & future needs		<input checked="" type="checkbox"/>
Wellness	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Fee for Service Packages	<input checked="" type="checkbox"/>	
Brand awareness and consideration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Focus for today's presentation

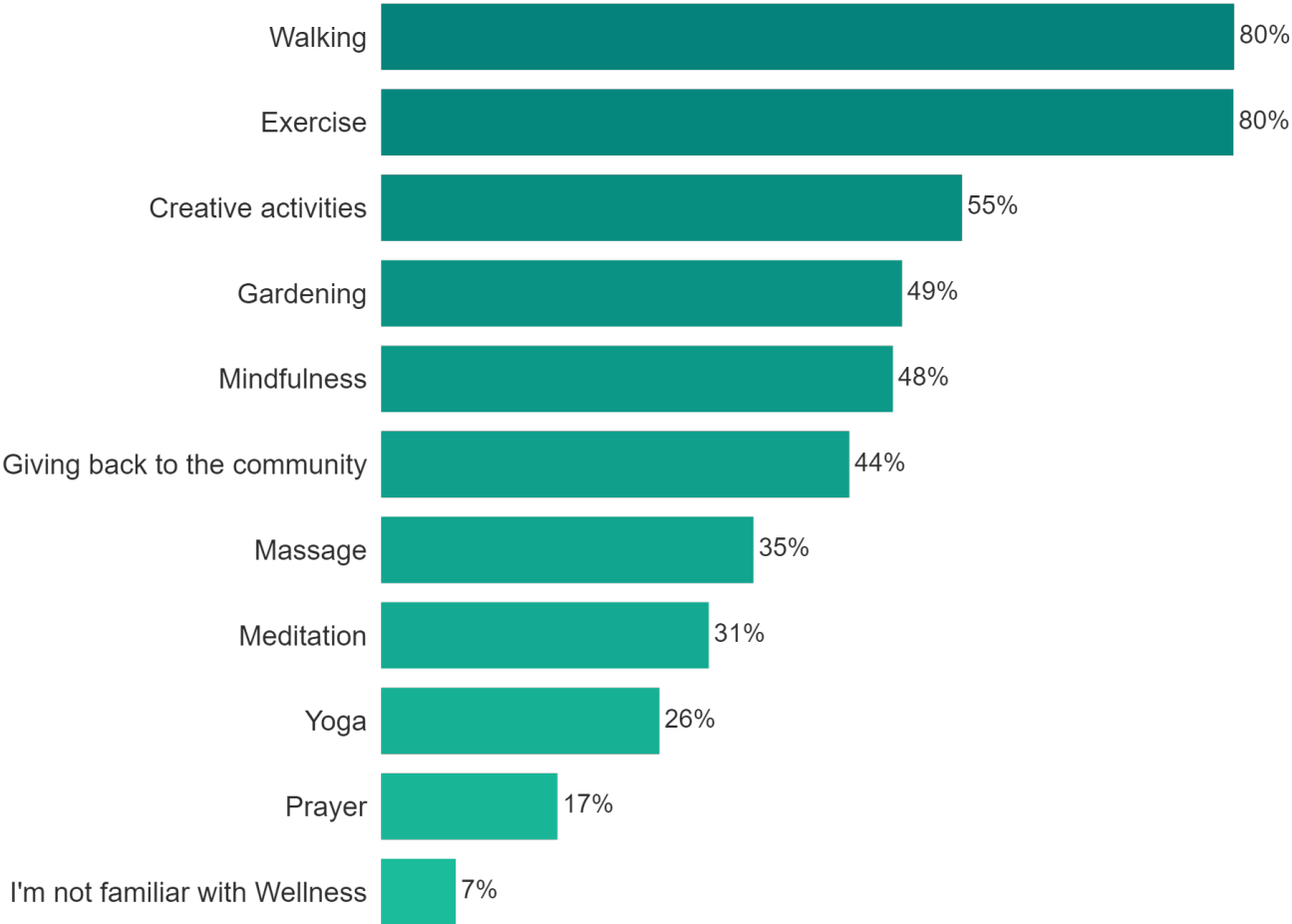
Topic	Shopper	Resident
Wellness	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Fee for Service Packages	<input checked="" type="checkbox"/>	

Feedback on Wellness

Age	(All)
Sex	(All)
State	(All)
Metro	(All)
Finance	(All)

Wellness elements

Which of the following do you associate with Wellness?



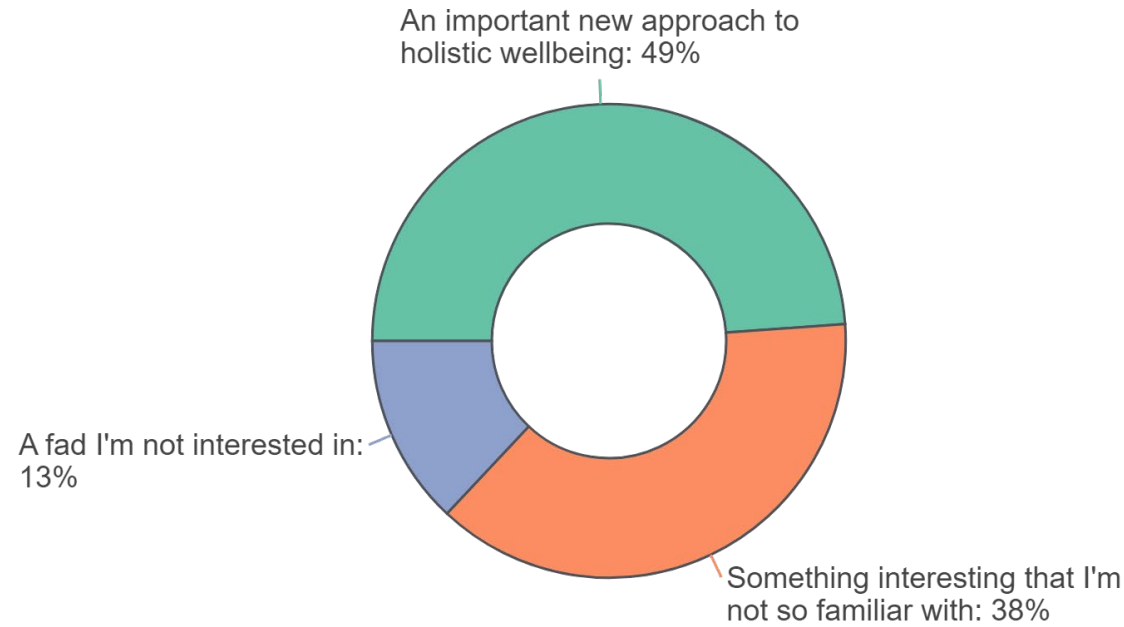
- Approximately half recognise creative activities, gardening and mindfulness as wellness activities in addition to the more obvious walking and exercise
- Over four in ten identify giving back to the community as a wellness option
- Very few are unfamiliar with Wellness



Base = Shoppers

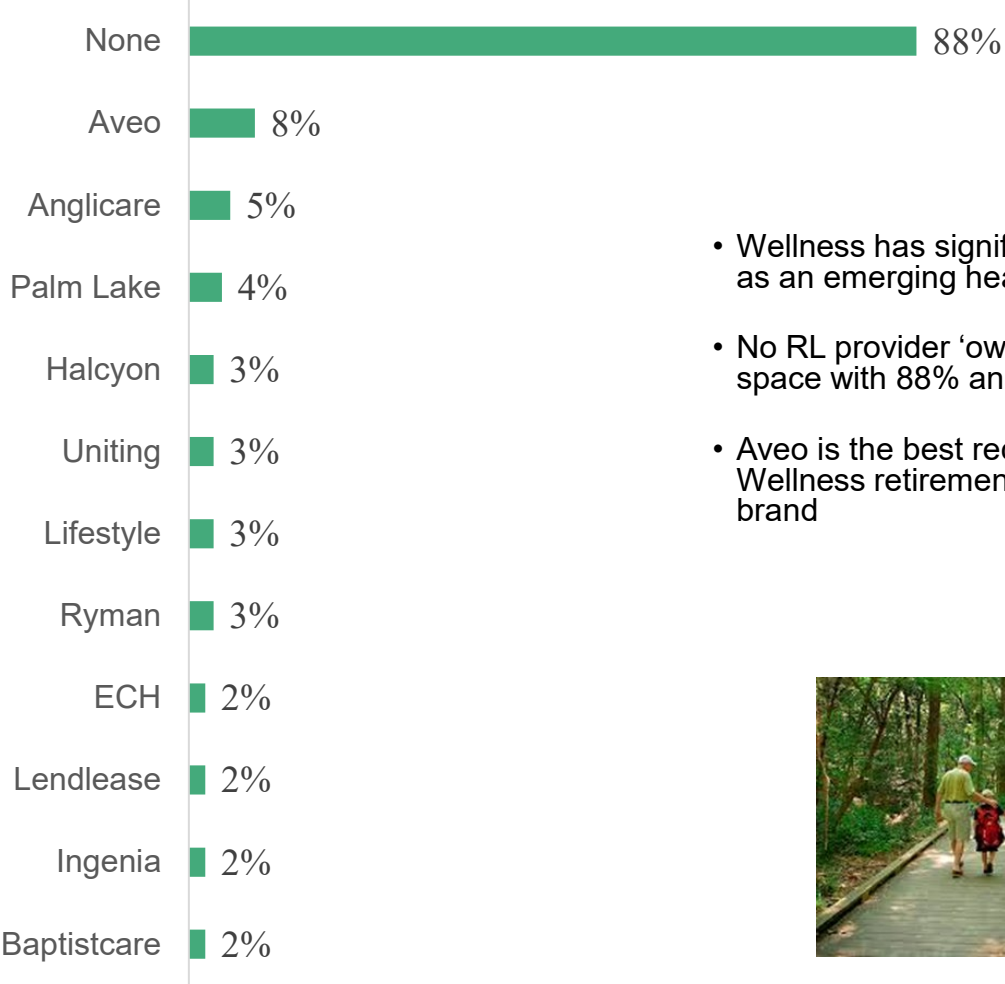
Wellness II

Which of the following best describes your thoughts on wellness?



Base: Shoppers

Which retirement community providers offer a strong Wellness package?



- Wellness has significant credibility as an emerging health trend
- No RL provider 'owns' the Wellness space with 88% answering 'None'
- Aveo is the best recognised Wellness retirement community brand



Base: n=number of responses to Wellness leader brand n=386

Choice Modelling

Choice modelling – an introduction

Lifestyle	Clinical/personal support	Wellness	Other services	Monthly fee
Group cooking	Registered nurse access	Meditation/Mindfulness	Laundry	\$250
Sports activities	Showering/Dressing	Exercise classes	Handyman	\$300
Board games	GP on site	Massage	Grocery delivery	\$350
Community garden	Hairdresser	Walking group	EV charging	\$400
Sundowner sessions	Counselling/Pastoral support	Quiet space	Tech support for computing / smart TV	\$450
Aquarobics	Telehealth		Transport	\$500
			Concierge	
			Meal delivery	

- Computer generated a series of packages by choosing one option from each column
- Respondents chose between two packages or ‘neither’ (see overleaf)
- By testing 20,000+ packages, we can determine the ‘weight’ of each category and the strength of each option in predicting choice

How package choices appear to survey respondents

Some retirement communities offer 'extras' packages. The following are hypothetical combinations of services that might be offered.

58. Which of the following combinations appeals most?

Lifestyle	Board games	Aquarobics	None: I wouldn't choose any of these
Clinical / personal support	GP on site	Chiropodist / Foot care	
Wellness	Yoga	Exercise Classes	
Other services	Tech support for computing / smart TV	Grocery delivery	
Monthly fee	\$350	\$300	
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Lifestyle	Aquarobics	Group cooking	None: I wouldn't choose any of these
Clinical / personal support	Showering/Dressing	Hairdresser	
Wellness	Massage	Exercise Classes	
Other services	Handyman	Tech support for computing / smart TV	
Monthly fee	\$300	\$350	
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Trade-off simulator

	Alternative 1	Alternative 2	Alternative 3
Lifestyle	Aquarobics	Aquarobics	Aquarobics
Clinical/ personal support	Access to registered nurse	Access to registered nurse	Access to registered nurse
Wellness	Exercise Classes	Exercise Classes	Exercise Classes
Other services	Concierge	Concierge	Concierge
Monthly fee	\$300	\$300	\$300
Preference Share	33.3%	33.3%	33.3%

- This is a static representation of the trade-off simulator in *The Catalyst Report* dashboard
- Users can adjust the mix of lifestyle, personal support, wellness, other service and fee options to see impact on overall preference
- Build the optimal package, or different package levels e.g. Silver, Gold, Platinum
- LET’S PLAY!

Conclusions

Wellness is accepted by most as an important element of health

No RL provider leads on Wellness

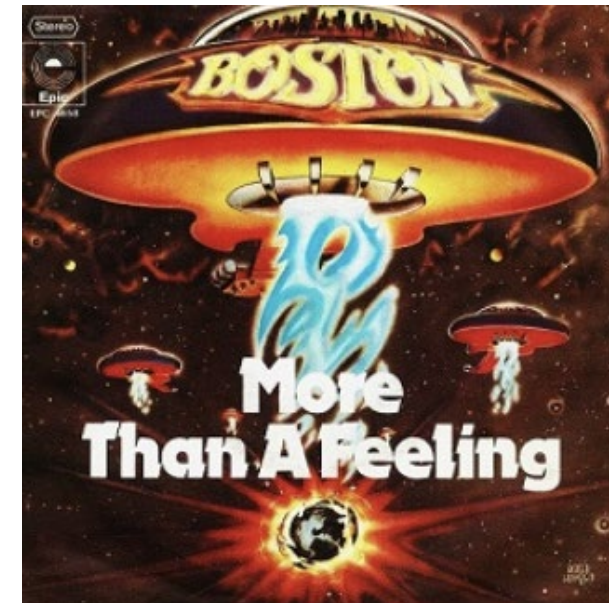
Wellness elements mesh with key quality of life drivers

Half of all prospects say they will join a fee-for-service program

- Physical health
- Mental health
- Sense of purpose
- Activities
- Companionship

Turning these elements into programs will:

- Keep residents happier and healthier
- Make your site more attractive to prospective residents
 - Generate positive word-of-mouth



The Catalyst Report – COO insights

- Home Care market survey
- Retirement Communities market survey
- RAC market survey
- RAC bed pricing portal
- HCP/CHSP market share portal
- HCP pricing portal

Catalyst Research – custom studies

- Stakeholder satisfaction / CX
- Mystery Shops
- Brand health tracking
- Innovation studies
- Quant research and Focus groups

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