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Understanding Aged Care

Summary Pack

Sept 2023

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Aged Care: An issue with scale

3.2 million

At any given point there are 3.2 million Aussies aged 70+ (ABS, Oct 2023).

Australians are living longer and the Royal Commission projected people aged 85+ will triple to 1.5 million by 2058.

1.2 million

Australians receiving aged care as of June 2022.

This includes:

- 407,000 people using residential aged care, respite or transition care in Australia.
- 818,000 people are assisted under the Commonwealth Home Support Programme (home support).

(Australian Government: Australian Institute for Health and Welfare, 2023).

370,000

There are currently 370,000 aged care workers in Australia (Department of Health & Aged Care, 2023).

Chapter 1

An industry
backdrop like
no other

A category that people
don't want to engage
with

50%

don't like or want to
think about
themselves ageing

70%

have not had conversations
about **planning for their**
own health and possible
aged care needs

And where the majority
are going in blind

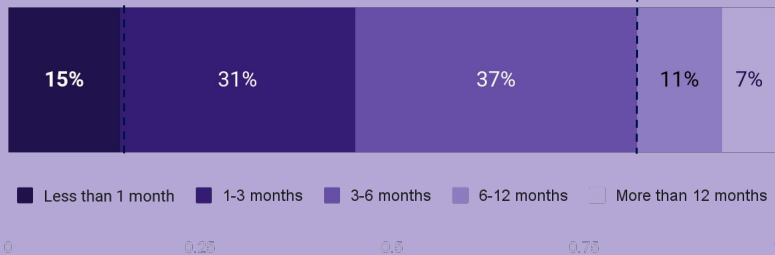
3/4

have had **no prior**
personal experience
with the category before
their first interaction

The category funnel is **incredibly shallow**

Two thirds of all aged care decisions are made in

1-6 months



Whilst the journey may be short, it can be experienced **multiple times** and for **multiple people**.

And navigation is **challenging** and **complex**

68% Of those **27%**
of people find it **moderately** or **slightly** challenging
find it **very** or **extremely** challenging

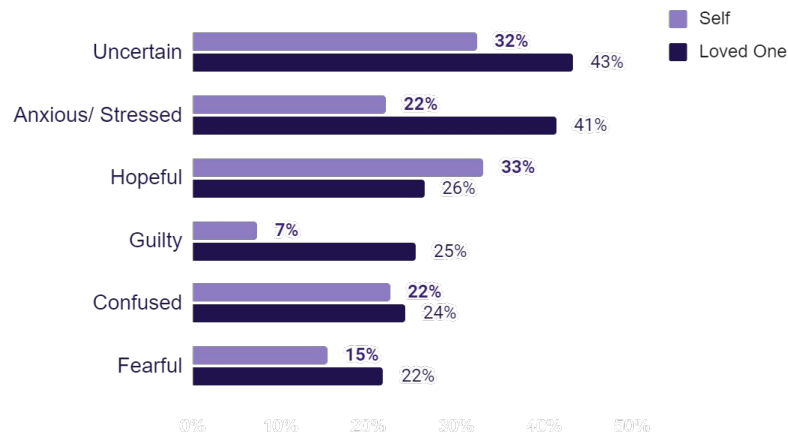
Decisioning is
clouded by
fear and anxiety

56%

say they are **fearful** of going into an aged care facility

And heightened when making decisions for someone else.

The dominant feeling at the start of the journey are a **sense of trepidation** and feeling of stepping into the **unknown**



“ [I felt] **DREADFUL** - as I promised Mum I would always let her live with us and would **never "Dump" her in a Nursing Home** :(”

Decision maker, female, Quant survey respondent

Wealth unlocks opportunity in aged care, but **how and why you enter the category** that has the biggest impact

Whilst those with better financial means have more opportunities and choices available to them, it is *how* and *why* people enter the category which have a bigger impact on their overall experience. Specifically whether they are:

- **Proactively choosing for themselves** - Explore and choose for themselves, less urgency, more positive emotions
- **Reactively choosing for a loved one** - decisions are often made quickly and focusing on the immediate physical needs, more urgency, higher stress and anxiety



Chapter 2

People entering the
system aren't getting
the support they need



Audiences are **crying**
out for support at
every stage of the
journey

87% Say that **how to navigate aged care and where to start** would be valuable

85% Say that information on **managing the emotional transition into aged care** would be valuable

84% Say that **expert analysis and reviews** would be valuable

People are seeking **transparent** and **trusted information** across three key areas

Financial Advice

They wanted to understand the financial implications and ensure they receive fair value for money.

- **52% -Cost and pricing** information for aged care services is the most valuable topic
- **86%** say that Aged **care financial planning** and advice, is a valuable topic
- **81%** - want to see aged care **real estate planning** and advice e.g downsizing, retirement villages, facilities

Range and Quality of Care

Vital information in making informed decisions, and understanding the ability to meet their specific needs.

- **43%** - value **service or facility reviews** and ratings
- **37%** -Information on different **types of aged care services** available (e.g., residential care, home care)
- **34%** - **Accreditation** and **quality standards** of aged care facilities
- **23%** - Service **provider's reputation** and track record

Lived Experience

In order to overcome fear of the unknown, understanding the lived experience of recipients is valuable.

- **32%** - Community **feedback and testimonials** from residents or their families
- **24%** - **Expert reviews** and **comparisons** from publications or websites
- **88%** - Would find information on **mental health and ageing** valuable

There is a meaningful role to play in helping people navigate the aged care journey, to overcome confusion and anxiety

Support is needed at every stage. The scarcity of impartial, reliable information creates an opportunity for brands and businesses.

Encourage positive early engagement

By

Normalise ageing and the need for aged care, reframing it as a positive proactive investment

When

Before the need arises

How

- Create open dialogues and discussion about the practical and emotional realities of ageing
- Highlight the importance of proactive planning to reduce the stigma and fear associated with the topic and overcome barriers to entry
- Remove the fear and lift the lid on aged care to shine a more positive light on the industry

Help people navigate with confidence

By

Providing root guidance to support and guide navigation

When

At the trigger

How

- Assume zero base knowledge of the industry.
- Terminologies, explainers, tips, tricks and pitfalls, to navigate the industry and remove confusion
- More information targeted at helping the family/ decision makers

Guide and inform decision making

By

Delivering transparent and trusted expert advice

When

During their exploration

How

- Practical and emotional guidance to key audiences in the moments that they need it most
- Expert advice, reviews and comparisons, with particular focus on financial and real estate decisions, service providers and facilities, lived emotional experience

Chapter 3

A workforce in crisis amid growing demand

A care and support workforce **twice the size** will be needed to meet forecasted demand in 2050

BUT

2/3 of Australia's current aged care workforce are **unlikely to still be working in aged care in five years' time**

Only
1 in 3

plan to stay in the industry **for more than 5 years**

(a further 1 in 5 are undecided)

78%

have **considered leaving**

46%

Are **currently considering leaving**

The demands of the job are increasingly taking a toll.
Those who are considering leaving tell us they are:

- Burnt out/mentally drained (28%)
- They are poorly paid (18%)
- Leaving for better opportunities (13%)
- They are working in a negative environment (12%)

Aged care workers are feeling **Undervalued, Underpaid and Unsupported**

Undervalued

Less than

1 in 3

Aged care workers feel valued by the **aged care industry, society or media**

Despite positive sentiment from families and residents, aged care workers feel they are experiencing systemic underappreciation.

Underpaid

60%

of aged care workers say they are **struggling financially (30%)**, or are **just getting by (30%)**

Even with recent 15% pay increase, aged care workers are still struggling.

Unsupported

56%

say that **staffing shortages and workforce issues** are the biggest challenge for the industry

50%

say that it is a **lack of funding and resourcing**

A lack of support, resources and funding means that many aged care workers are unable to deliver the level of care they aspire to.

The **Royal Commission** has yet to deliver significant positive change

Workers believe that the Royal Commission into Aged Care has had a *positive* impact on the industry.

However, whilst there has been some positive shifts in terms of raising awareness, focus on quality of care and some workforce improvements, more significant change is yet to be seen.

1 in 3

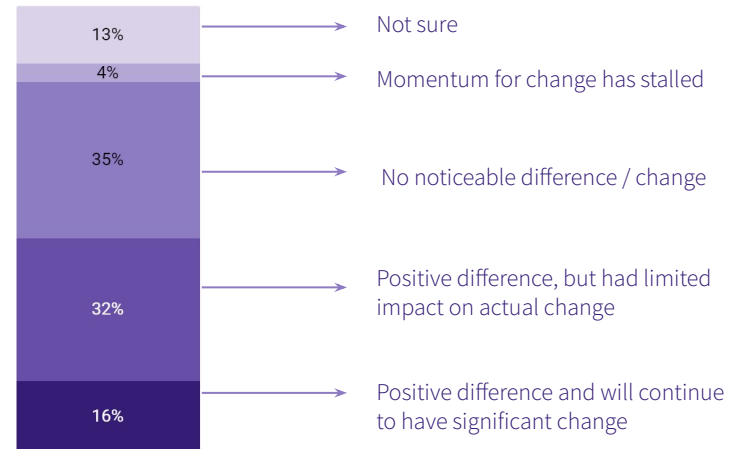
Say that the Royal Commission has **had a positive impact** on their attitudes towards aged care.

but

Less than
Half

Believe it will lead to actual **significant change to the industry.**

Aged Care Workers perspective



How we can advocate for aged care workers

Advocate for change

Improved Working Conditions: Advocate for better working conditions and fair treatment of personal care workers, which they themselves consider as the most critical need.

Raise Awareness of Challenges: Highlight challenges faced by aged care workers, shedding light on the complexities of their roles and the need for systemic improvements.

Expose Inadequate Support: Act as a platform to expose instances of mistreatment, inadequate support, helping to bring about necessary reforms and ensure workers' well-being and ability to deliver care.

Acknowledge their contributions

Highlighting Contributions: Recognise and publicise the contributions made by aged care workers, giving credit for their roles in the healthcare system.

Educating the Public: Educate about the variety of roles, challenges and successes workers have, helping to foster a deeper appreciation for their dedication and impact on society.

Influencing Public Perception: Actively work to reshape public perception around aged care workers, emphasizing their value and the vital role they play, to attract more people to the industry.

Amplify their voices

Facilitate Inclusion: Provide a platform for aged care workers to actively participate in discussions and policy debates, ensuring their voices are heard and considered.

Elevate worker narratives and perspectives: Showcase personal narratives and experiences of aged care workers, allowing their voices and perspectives to be heard in stories of the industry.

Summary

Aged care has an industry backdrop like no other.

- People don't want to engage with it, they are entering blind, and their decisions are clouded by fear and anxiety.
- Category navigation is challenging and complex, and often in times of high emotion and urgency.

1

People entering the system aren't getting the support they need

People are crying out for support at all stages of the journey.

We need to

- Encourage early engagement
- Help them navigate with confidence
- Guide and inform decision making

2

A workforce in crisis amid growing demand

A workforce of twice the size will be needed to meet growing demand, but 2/3ds of current aged care workers are considering leaving.

We need to

- Advocate for change
- Acknowledge their contributions
- Amplify their voices