

The Future of Care

... HOW THE NATION WANTS TO AGE

Caterplus
Catering with care



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About the report

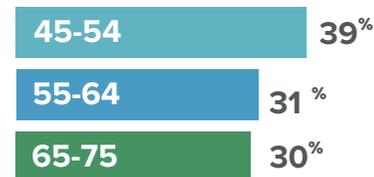
At the end of 2018, Caterplus, the specialist care catering arm of Elior UK, commissioned research from marketing intelligence company Panelbase.

With vast experience catering to the care industry, our priority at Caterplus is to listen to customers about how they want to live in later life. So, our aim was to find out how the nation really wants to age - and give an insight into what the care provision of the future will look like. How culinary, environmental, health and cultural offerings within care will change over the next twenty years.

The Future of Care: How the nation wants to age is the result of a UK-wide survey of over 3,000 respondents aged between 45 and 75.

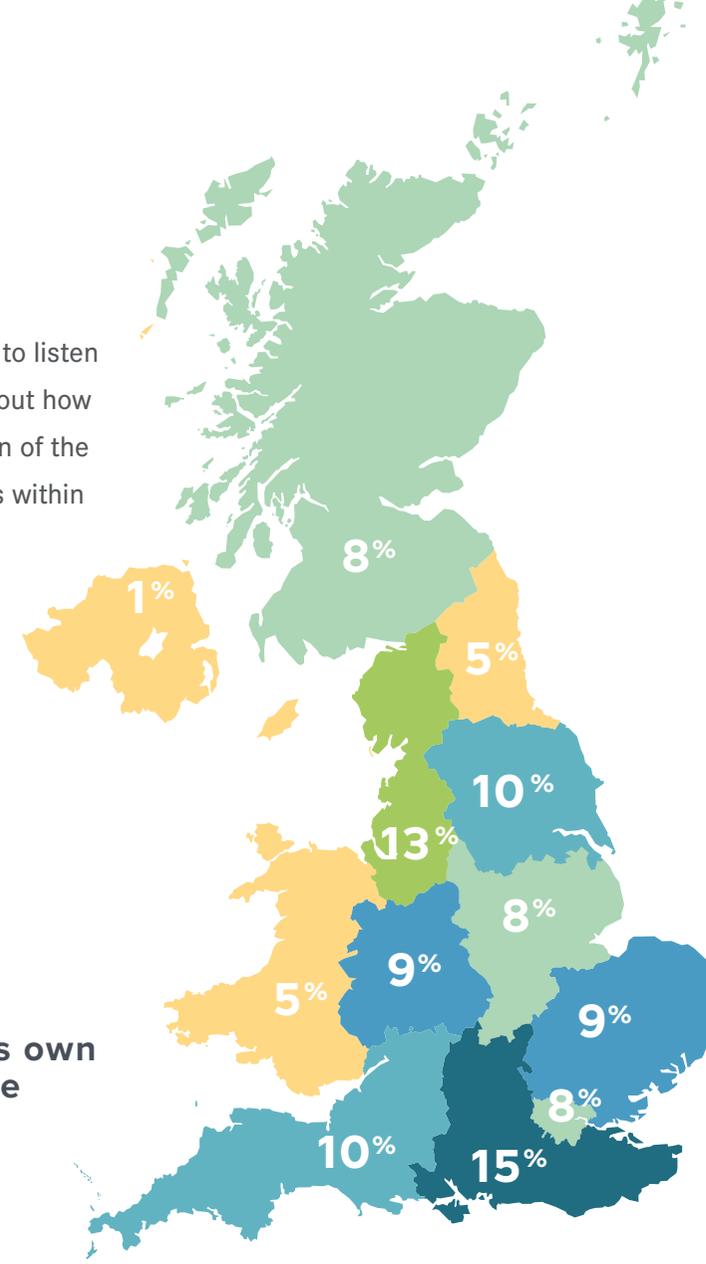
UK-wide survey | 3,000 respondents

AGE GROUPS



76%
of respondents own
their own home

GENDER



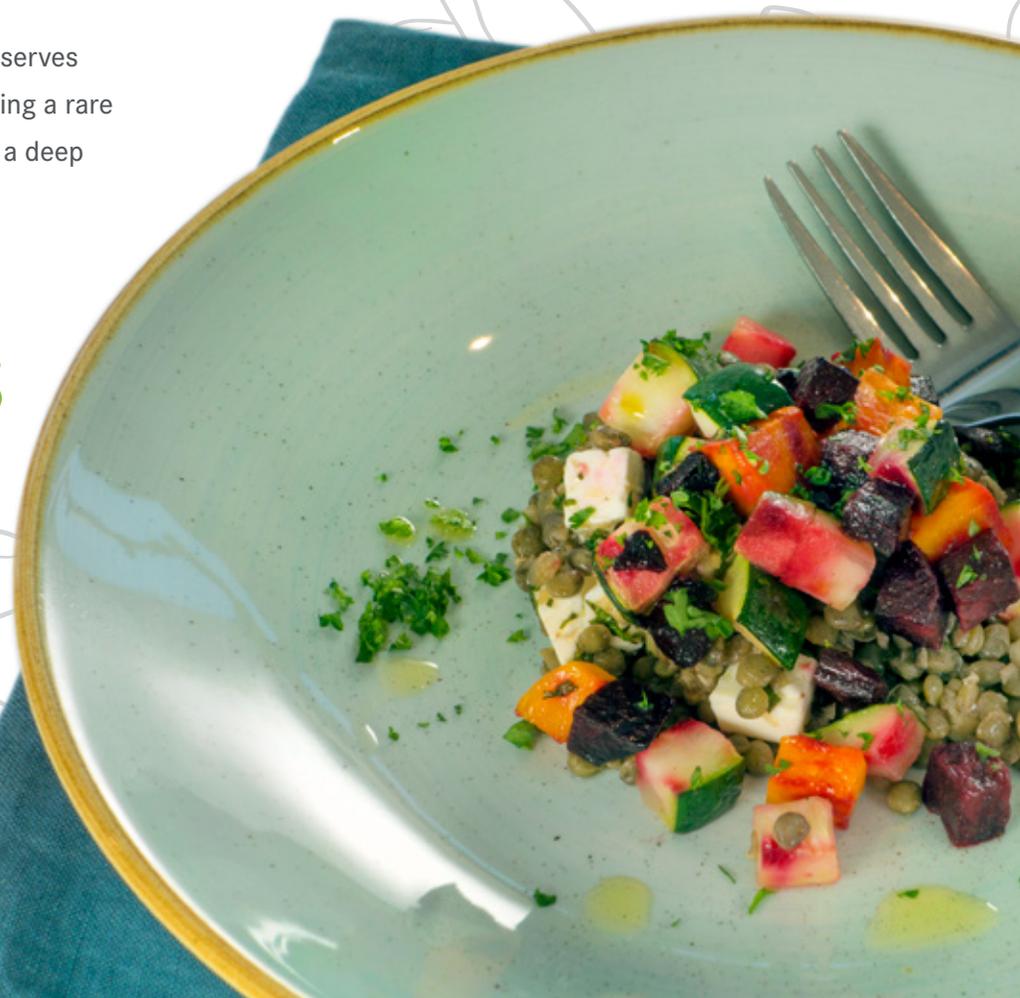
About Caterplus

Caterplus is one of the UK's leading catering service businesses specialising in the care and retirement living sector. It operates exclusively in this sector across different establishments such as residential care homes, assisted living and extra care, independent living, specialist catering and charitable communities.

Serving growing and diverse needs, Caterplus is the leading provider of healthy, heart-warming food and service environments within the care sector, boosting social life and friendships. Caterplus development chefs and its dietetic team strive for creativity, quality and high standards to ensure it operates to the very best practice in food preparation and service on every site.

The business has been built on the principle of dedication to improving the lives of the people it serves every single day, offering great food and commitment to individual needs and preferences. Offering a rare combination of national coverage and locally based services, Caterplus is a service partner with a deep understanding of and specialist experience in the complexities of the care sector.

Caterplus
Catering with care



Foreword



Paul Burstow
Former Minister of State
for Care Services

What does the rock and roll generation want from care?

Too often we see ageing and care through a rear-view mirror, looking back on the experiences of our grandparents and parents. But when we talk about ageing and meeting the needs of an older society, we need a design-informed approach that is tuned in to what people aspire to have in later life.

The Commission on the Future of Residential Care¹, which I led, was clear that people want real choice about where they live in later life. Building a place you call home, not an institution, was one of the most prevalent priorities for the future of care.

Technology is part of our everyday lives. It keeps us connected, informed and provides vital goods and services. So why should that change when you need later life care?

This report highlights how people expect technology to help them manage their life in care, receive tailored support, stay connected and simply make their life easier. So, any care home without technology such as Wi-Fi – and there are still too many – is out of step with how people want to live.

“Building a place you call home, not an institution, was one of the most prevalent priorities for the future of care.”

Hospitality, social interaction and purposeful activity are also essential ingredients in great care. This report is a timely reminder that good food and companionship should not be overlooked.

By listening to people in later life we can make a difference now. This insight can inform decisions and policy on the future of care, offering actionable advice on building care offerings around what real people truly want. Care providers and policy-makers would do well to take on board the insights and challenges in this report, to improve future care for generations to come.

1. A vision for care fit the 21st Century, The Commission on Residential Care, Demos, 2014 <https://demos.co.uk/project/the-commission-on-residential-care/>



Executive summary

Over 50s account for more than a third of the population and half of consumer expenditure. **They hold 80% of all personal wealth and control around 70% of all disposable income, so they can afford to be choosy when it comes to care in later life.**¹

What's more, this generation is increasingly well travelled, tech savvy and discerning. They know their options for later life care are expanding way beyond the dated 'care home', with retirement villages, warden assisted flats and other accommodation offering a lifestyle based on independence, community, communication and entertainment.

This choice and knowledge is turning the over 50s into an increasingly powerful group of consumers. Understanding what they want will have a significant impact on what we build, the facilities we offer, the food we serve and the healthcare we provide.

Caterplus commissioned research from marketing intelligence company Panelbase. Its aim was to find out how the nation really wants to age - and to give an insight into what the care provision of the future might look like.

Our research highlighted five key areas of consideration:



Key learnings

Life choices

80%

said the most important factor affecting the choice of care provision was 'freedom of life'



Evening dining

86%

want a hot meal to be served at dinner – different to the current model where those in care are served a hot meal at lunchtime



You are what you eat

The ageing population is acutely aware of the link between healthy food and healthy ageing so the demand for a nutritious diet is high

Moving together

55%

expect to move into a care provision with their partner



Staying connected

97% expect internet facilities as part of their care provision



Consumer expectations will not only shape the care sector in the future, but impact industries such as building services, foodservice and healthcare. Consumer insights give these businesses the opportunity to enhance their offering to meet their expectations. They need to be looking now for answers to questions about the future of their businesses:

- **How should we ensure our offering continues to appeal to future older generations?**
- **How can we adapt our lifestyle services and facilities to meet residents' needs?**
- **What will residents want from our culinary services?**
- **How can we embrace technology to provide residents with more information and interaction?**

The industry should be finding answers quickly to meet the changing demands of future older generations, focusing on community building, bridging the gap from independent life, offering exciting and flexible culinary options and lifestyle-enhancing technology. In today's environment it's important to recognise that with limited government funding available, it's an increasing challenge to meet all consumer demands within a public framework. However, both public and private care providers can still focus on delivering services to meet these demands within their capabilities.

Introduction

Robin Givens



Robin Givens

Elior UK Managing Director. Contracts.

There's no denying our perception of ageing has changed. Gone are the days of beige clad grandparents in their 60s, content with whiling away their time in an armchair, in front of the TV.

Over 70s fitness classes are now the norm, senior travel is becoming increasingly more adventure based and 80% of 65-74 year olds are recent internet users.

In a world where we rely on technology for everything from parking to paying, and where personalisation has become almost expected, we were interested to find out how the habits and trends of today will shape the care provision of tomorrow.

We've set our sights on the future, looking at the next few generations and their expectations of care.

Findings from our research offer wide-ranging insights and constructive recommendations for the industry – from the preferred type of care, transition process and how people want to enjoy later life.

We hope you find this insight into how the population really wants to age valuable food for thought. It certainly gives us as an industry – caterers, care providers, architects and builders – a clearer direction as to what we should be doing to create a future care provision that is truly fit for purpose.

“In a world where we rely on technology for everything from parking to paying, and where personalisation has become almost expected, we were interested to find out how the habits and trends of today will shape the care provision of tomorrow.”

The future of care: what it looks like

We asked the ageing population what it thinks will define the future care provision in the next 20 years.

The role of technology. 66% of the ageing population expect the rise of technology in care provisions to make life easier. With technology seen as an enabler among this tech savvy group, it will play a significant part in the future of care. The biggest prediction for how technology will play a role in the care provision of the future is by enabling people to monitor their own health and wellness (73%).

Most desired facility? Cafés. Café culture represents social interaction and customer choice – two important factors for retaining independence in later life. Facilities that offer this lifestyle will be a top choice for potential residents.

The dream future provision? If money was no object, care provisions would be homely but act like high quality hotels.

-  Near nature
-  Plenty of room for visitors
-  Cosy, safe and homely
-  Services running as smoothly as a premium hotel



“I’d like a variety of facilities, rather like a small village. Freedom to roam around as and when you want, eat when you want. A small suite with a bedroom, bathroom and lounge area would be ideal, so that you can entertain visitors in your own room if you want.”

“An apartment block with on-site bars, restaurants, doctors, shops, bookies.”

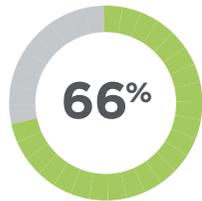


“Like staying at a top hotel but with less ceremony and more friendliness.”

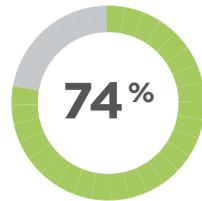


The nation has spoken – it wants a top quality hotel experience.
The question is, will people be prepared to pay for it?

A closer look at technology



66% expect the rise of technology in care provisions to make life easier



74% want to oversee their own care profile and preferences using a mobile or tablet app



75% With the advances in technology, 75% of the ageing population think it's important that a more personalised service is provided

This positive expectation decreases as age increases

How people would use the internet

Keep in touch with family and friends 83%

Keep up to date with the news 76%

Streaming TV 51%

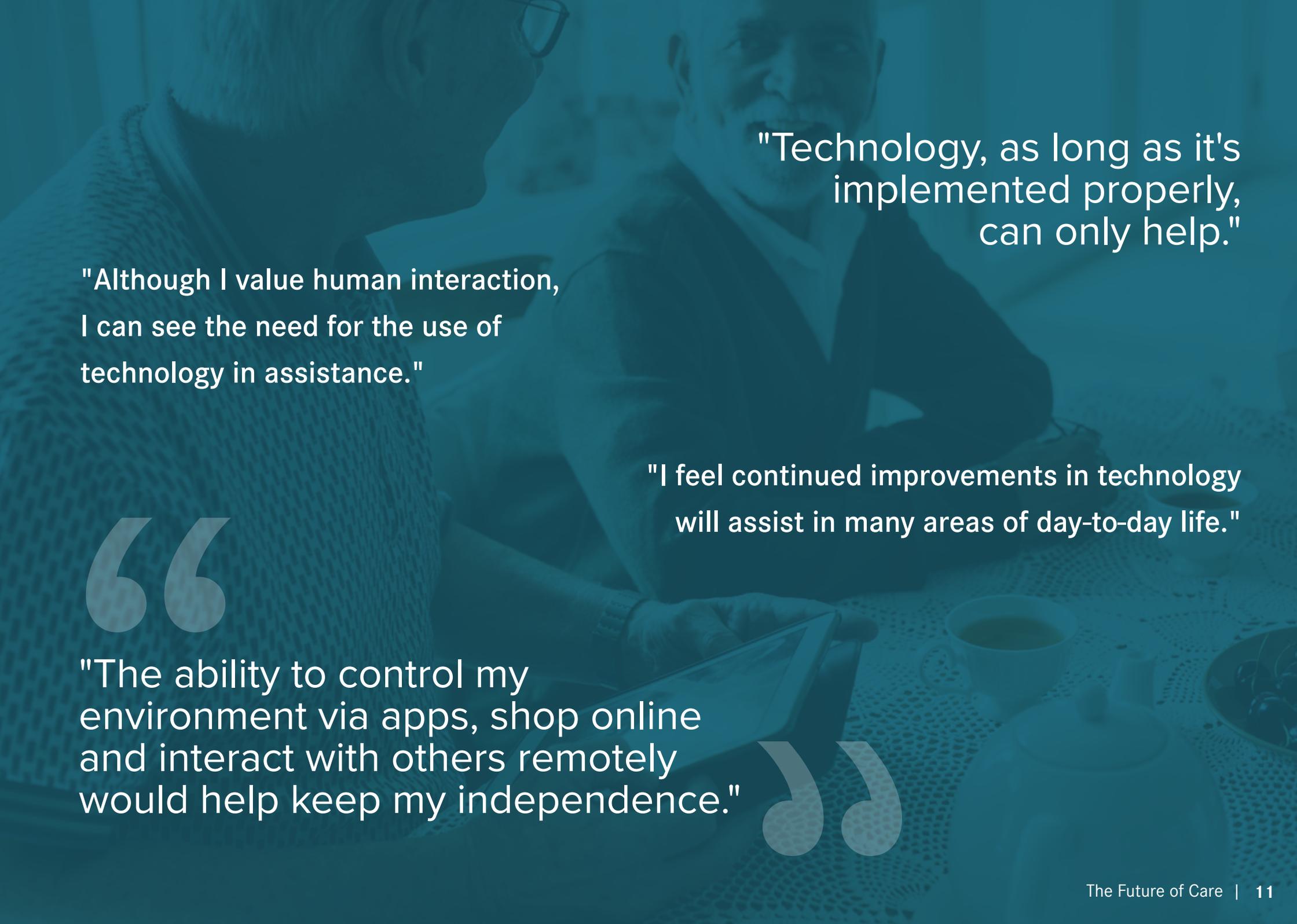


Females are 12% more likely to use the internet for keeping in touch with friends and family



Males are 8% more likely to use the internet for streaming music





"Technology, as long as it's implemented properly, can only help."

"Although I value human interaction, I can see the need for the use of technology in assistance."

"I feel continued improvements in technology will assist in many areas of day-to-day life."

“

"The ability to control my environment via apps, shop online and interact with others remotely would help keep my independence."

”

Consideration #1

Choosing a later life care provision



Getting older inevitably brings new considerations and important decisions to make. From medical care, diet and nutrition, accessibility and community, residents need to be assured that a care provision is right for them. We asked what would affect their choice of care provision.

53% of the ageing population had not previously thought about how they would like to be cared for in later life



48%

of people said their first choice for receiving care would be in the comfort of their own home



60%

The food and drink offering of care provisions is also a deciding factor for 60% of people.

Food is more than just nutrition – it represents community, culture and entertainment. Care providers with exciting, varied and flexible food offerings to food and drink will be more appealing to prospective residents.

“I’d want to be cared for in the comfort of my own home, surrounded by the things I cherish – photos, books – and with lots of space. I couldn’t sit and watch TV every day and not need to be outside, so it would need to be a rather alternative care facility to meet my needs. I’d also want to choose my own food.”

- Kay, 61, North East Scotland

“My ideal set up would be assisted living. In a dream world, this would have extensive sports facilities, a restaurant I could go to ‘on demand’ – food is important to me – and space to relax outside of my room.

Hopefully, I’d move in with my wife. But I guess if I was widowed, the social aspect of assisted living would appeal more. The fact I’d have companionship and the choice to interact with fellow residents if I wanted to would be nice.”

- David, 49, South London

39%



39% of Londoners would prefer to live in an assisted living complex

50%



50% of respondents who identified as Black, Asian and minority ethnic would prefer to be looked after by family

26%



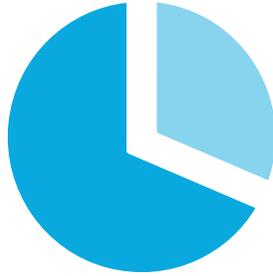
The second most desirable care option is assisted living complexes



Females are more likely to choose assisted living complexes than males

Family support

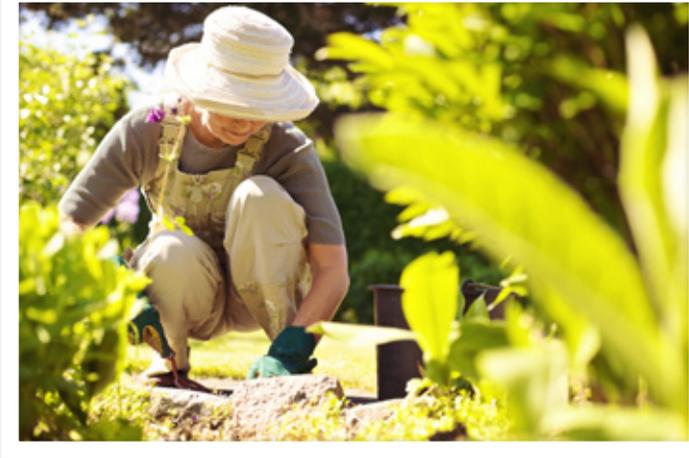
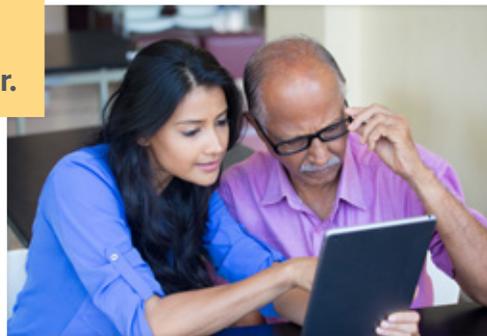
Support for the significant transition to later life care is crucial. Over two-thirds of people expect friends and family to help with research and just under half revealed that friends and family would be the most influential factor on their final decision.



47% expect their children to assist them in choosing a care provision

37% expect their partner to assist them in choosing a care provision

65-75 year-olds are more likely to rely on their children to help them decide than those who are younger.



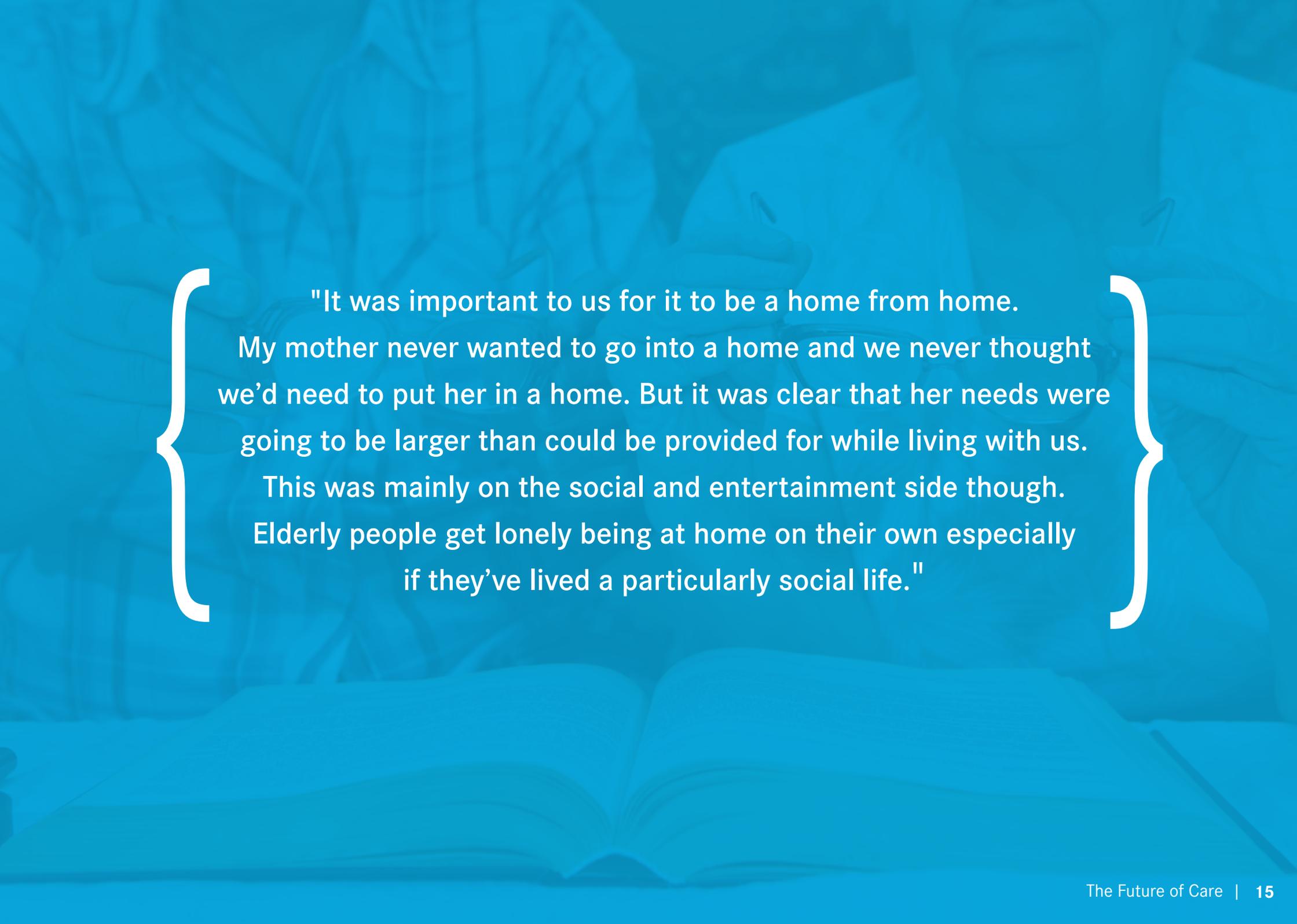
Sustainable living

64% of the ageing population say that sustainability and environmental policies of their future care provision would be important to them.

Cost of care also plays its part for 35% of people and is especially important to males.

The deal breaker? Quality of care facilities.

41% of the ageing population think the most critical factor for choosing a care provision is the quality of facilities on offer.



"It was important to us for it to be a home from home. My mother never wanted to go into a home and we never thought we'd need to put her in a home. But it was clear that her needs were going to be larger than could be provided for while living with us. This was mainly on the social and entertainment side though. Elderly people get lonely being at home on their own especially if they've lived a particularly social life."

Consideration #2

Moving in



Care providers need to ensure they make the transition from fully independent life to assisted living and care smooth and stress-free. Handling this process with sensitivity is a must, as residents want to live with the independence and home comforts they are used to.

Maintaining **freedom of life** is crucial at any age. For **74%** of the ageing population, their later life care provision needs to understand this.



Moving in

In an ideal world, a significant number of the ageing population (**88%**) expect care provisions to be equipped for them to move in with their partner.



From home to home

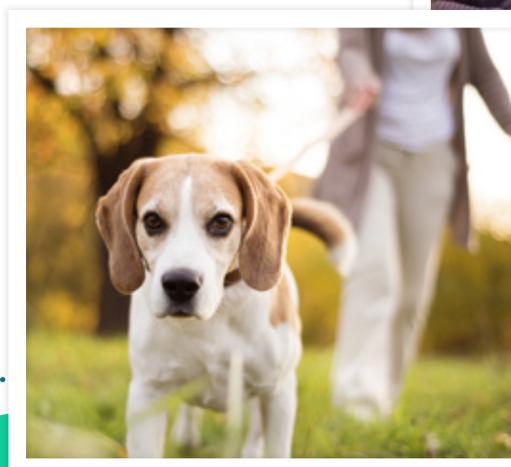
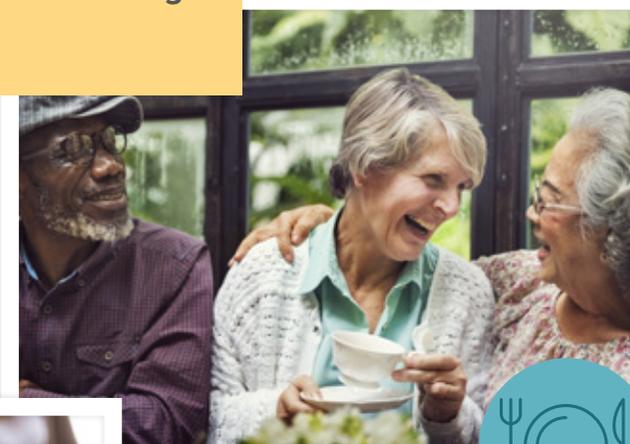
84% want their chosen care provision to resemble a home but offer the services of a hotel. ★★★★★



Pets

54% want to have their own pets in their chosen care provision.

Organising social activities and outings, providing facilities to cook their own food and means to communicate easily with friends and family are just a few ways to ensure residents are maintaining their freedom.



Consideration #3

Everyday life



It's the little details that matter. The ageing population expects a range of services dedicated to their physical and mental wellbeing and that allow them to be as independent as possible in everyday life.



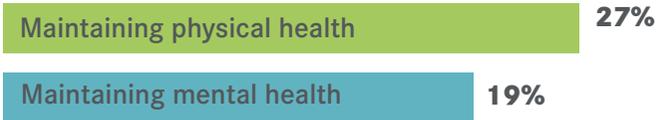
Despite increased reliance on medical care in later life, the majority of the ageing population want their interaction with doctors on a **needs-must** basis.



66% only want to see a GP or doctor when they need them

14% once a week **13%** once a month

Main concerns expressed for growing older



Exercise classes are proven to boost mental wellbeing and physical fitness, and are a priority activity for the older generations.

Exercise classes in care provisions



74%

74% expect regular exercise classes to be organised at their care provision



Yoga, dance, Zumba, swimming and aerobics are the most in demand exercise classes



69%

69% of people would book on to activities and classes using technology or apps



Visitors

Staying in touch with the outside world is important to the ageing population. Time spent with friends and family is vital for social interaction and mental wellbeing.

To accommodate for this, care provisions should be designed for residents to enjoy time with visitors.

Most popular location for socialising with visitors

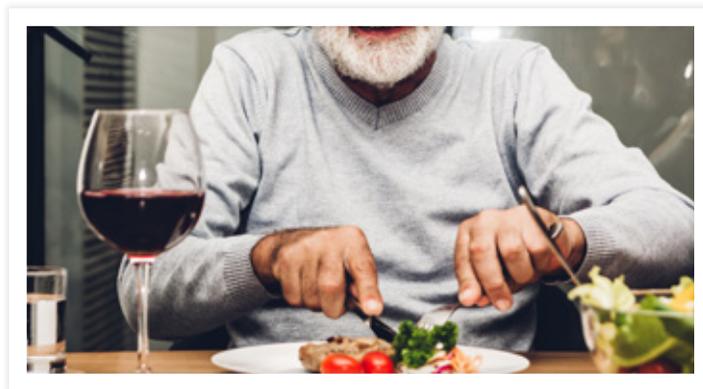
- 40% resident's room
- 19% garden
- 15% café



Care providers need to think about the spaces and facilities on offer to both residents and their guests. Extra seating, varied menus, family booths in cafés and garden features are just a few of the facilities to consider.

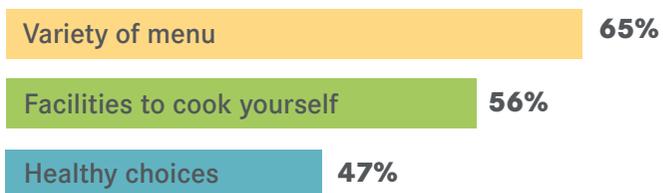
Food and drink

They say you are what you eat. Not only fuelling you for the day ahead, mealtimes encourage social interaction with other residents and a chance to explore new cultures through food.



A nutritious and flavoursome food and drink offering with plenty of choice will set a care provision apart from the rest. Flexibility is also important too, with diverse dietary needs and mealtime preferences.

Most desired food offering options at care provisions



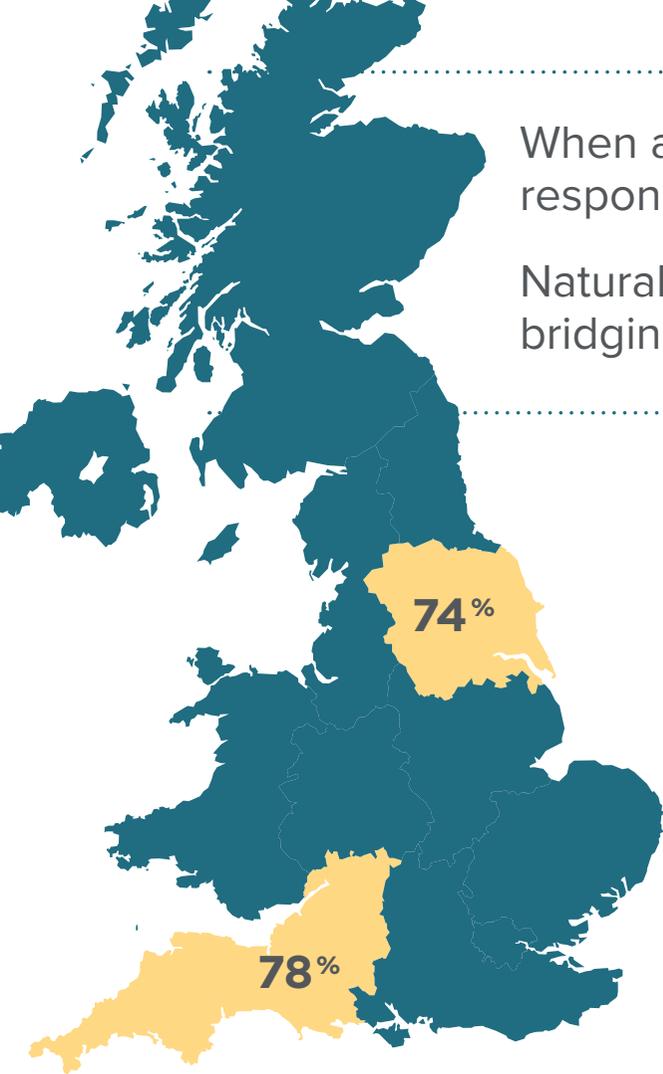
67% would want their largest meal to be served in the evening – different to the current model of a hot meal being served at lunchtime.

The majority of people want flexibility around their mealtimes.

Only 28% would prefer three meals a day at a set time.

When asked what the **most popular service** from a care provision was, respondents ranked **food shopping delivery** as #1 (if cooking for themselves).

Naturally, this adds flexibility to their lifestyle, bridging the gap between fully independent and assisted living.



62% Tea was voted the most important drink to be offered

Followed by filtered water (47%) and barista quality coffee (39%)

With the rise of vegetarianism and veganism in recent years, it's no surprise there is demand for these options. **45-54 year olds are twice as likely to want vegetarian or vegan menu options than 55-75 year olds.**



Diverse dining experiences...

- All day grazing
- Bespoke orders
- Traditional family dining
- Delivery and takeaway options
- Pop-ups

Those from the South West (78%) and Yorkshire and the Humber (74%) had the strongest desire to drink alcohol in their care provision.



67% expect to drink alcohol in their chosen care provision.



Females are 5% more likely to want to drink alcohol than males.

Things to consider...

- Cultural and religious needs
- Health and wellbeing
- Community engagement through food

Consideration #4

Must haves



There are some things in life we don't want to compromise on.
So, what would the nation struggle to live without?



Café culture

With different tastes, routines and preferences, people enjoy flexibility.

71% expect to see a café, restaurant or bar that can be visited outside of meal times. An iconic part of café culture is socialisation, which is particularly important for the ageing population making the transition from independent life.

71%



Leisure activities

Ageing often affects mobility, however the nation still expects care provisions to provide entertainment with trips out, new things to learn and community activities. **65% expect shopping trips to be organised, followed by musical activities, puzzles and game.**

65%



Traditional British fare

There's nothing more comforting than a traditional, home cooked meal. The ageing population **most want to see traditional British food on the menu**, with 74% listing it as their most important menu choice.

The other most popular cuisines for the ageing population are Italian (62%) and Chinese (54%)

74%

Consideration #5

Expectations vs. demands



What does the ageing population really expect from future care provisions? From everyday dining to keeping in touch with family and friends, they share what they really think will be offered at future care provisions.

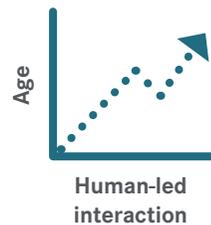


Interaction

Building relationships with employees and other residents is an important part of community life in care provisions.

Despite considerable advances in technology in recent years, 63% expect their interaction in their future care provision to be more human-led than tech-led.

75% think it's important that a more personalised service is provided.



The desire for human-led interaction increased along with age bracket

Home food vs. catered food



61% of the ageing population think their food choices in a care provision will not be the same as they have now.

Why?

People expect lower quality food which they assume to be caused by low funding in care and mass catering. However, this does vary depending on geographical region.



However, 66% expect the rise of technology in care provisions to make life easier.

Again, this positive expectation decreased as age brackets increased.



Outside communication

Respondents want to use the internet to:



Conclusion

It's time to re-think elderly care.

There's a demand – and huge business opportunity – if we focus on delivering a new experience for the ageing population.

Our research has highlighted that this group of powerful consumers expect their investment in later life care to represent a high-quality, community-driven and supportive service. They wish to continue their independent lifestyles, but enhance them with the support of a caring, involved and flexible care provider.

The nation dreams of a later life spent in a setting that mixes an atmosphere of a cosy home with the facilities of a high-quality hotel. As an industry, we should be focusing on how our services can meet this demand. How we can incorporate restaurants, bars and sports facilities. How to make entertaining friends and family in a flexible way a reality. And how we can create communal spaces that encourage community among residents – be it through communal cooking, café culture, fitness classes or activities.

We also need to be thinking seriously about embracing new technologies but doing so in a way that's sensitive and inclusive. The ageing population demands human-led interaction, therefore it's important to consider how specialist teams such as front of house, catering, medical, fitness and wellbeing will support residents.

And, of course, keeping a strong focus on food. Something we know is already one of the main highlights of a resident's day. With the food and drink offering a deciding factor for over 60% of people, a flexible offer catering to different tastes is a must for any successful, well run care provision.

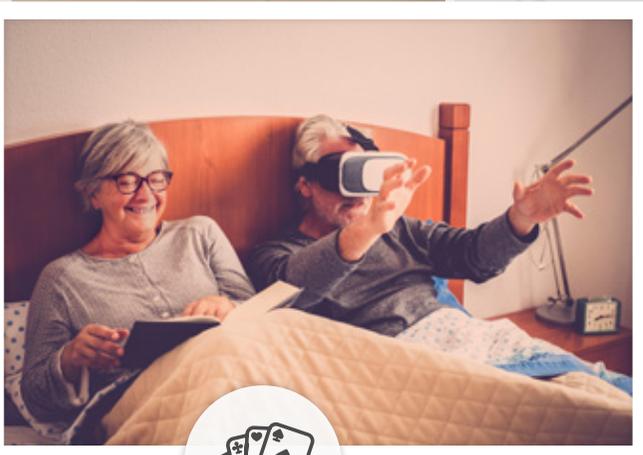
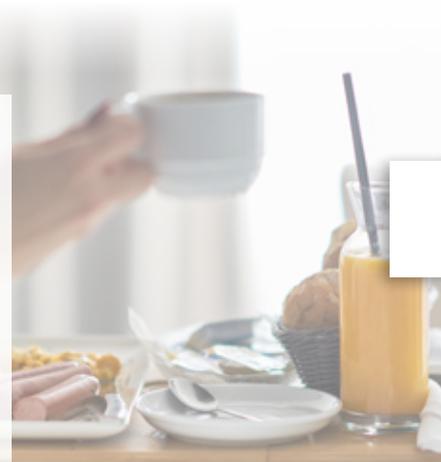


What next?

To cater for these expectations, the care provision of the future will need to equip itself with employees who have the right expertise and deliver the high quality service and food that residents expect.

What should care providers, building services, foodservice and healthcare companies offer to appeal to the ageing population?

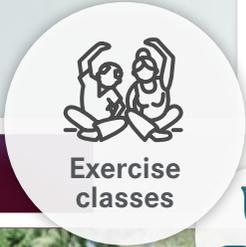
Give your customers the future of care



Activities such as shopping, games, and music



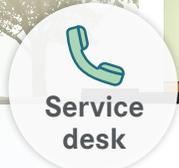
More interaction between residents and staff



Exercise classes



Medical support



Service desk



Restaurant with healthy food





The Future of Care

... HOW THE NATION WANTS TO AGE

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