

2024/5

Nov and Dec: In Field

Mar: Report



StewartBrown Retirement Living Performance Report

Annual Comprehensive Sector Survey

Separate benchmarking, analysis and report for each retirement living sector:

- land lease communities
- retirement villages

Building a trusted, independent, evidence based tool for customers, operators, government and media

Responding to the need of all key stakeholders – customers, operators, governments and the media - to build a stronger understanding of the retirement living and seniors housing sector, StewartBrown is introducing a comprehensive sector survey and performance report.

It will provide evidence-based, objective analysis, and accurate data to improve sector performance transparency and knowledge to key stakeholders.

The report will improve the ability for data-supported advocacy based on a national coverage of retirement living operators.

The StewartBrown Reports are trusted by all parties for their independence and depth of analysis.

Retirement living crossroads

This is a critical time for the land lease and retirement village sectors.


The supply of age appropriate housing is rapidly falling behind seniors population growth, with new government support at all levels essential, along with new funding support and customer education.


Care support and housing is forecast to be severely undersupplied as early as 2025. New government policies, new products and new services are required urgently but real data is required to support these initiatives.

The discerning and demanding Baby Boomer customer is requiring confidence to make commitment decisions and is seeking trust in the operators that value propositions will be delivered.

StewartBrown Retirement Living Performance Report

 An **independent** third party

 **Engaged** with sector stakeholders, operators, advocacy groups (consumer and operator), and government bodies






 Utilise **proven systems/processes** established in StewartBrown's renowned Aged Care Financial Performance Survey

 An **annual** survey





Key performance metrics

Every 12 months the Report will collect key data that is readily available for most operators and essential for strong oversight of your business.

For land lease and retirement villages, the data collection will cover subjects such as:



Contract Structuring and Sales	Unit reinstatement and renovation costs	Financial Data	Resident demographics	Resident services
 <ul style="list-style-type: none"> Ingoing contribution/entry prices Key sales KPIs DMF/Retention structure 	 <ul style="list-style-type: none"> Capital replacement and maintenance policies average cost and time to reinstate unit back to market Average cost and time to complete major refurbishments 	 <ul style="list-style-type: none"> Recurrent Service Charges Operator contributions Key expenditure items - R&M, corporate overhead allocation etc. Pipeline development 	 <ul style="list-style-type: none"> Occupancy Average age of residents on entry and exit average resident length of stay in village Reason for exit 	 <ul style="list-style-type: none"> Care service provision offered Home Care package uptake Amenities and services Resident satisfaction - separate survey

All territories, all sizes, all financial models

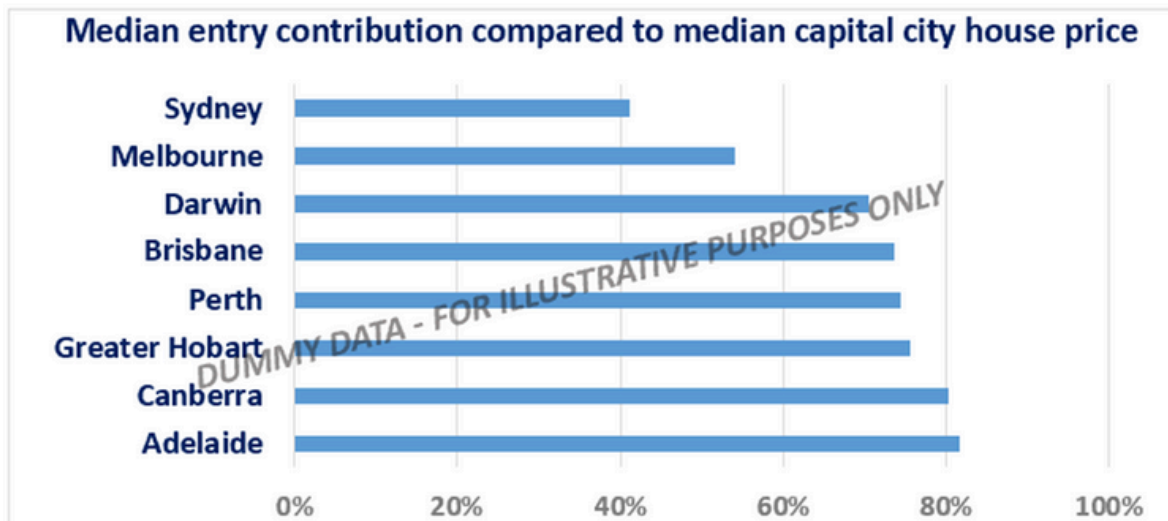
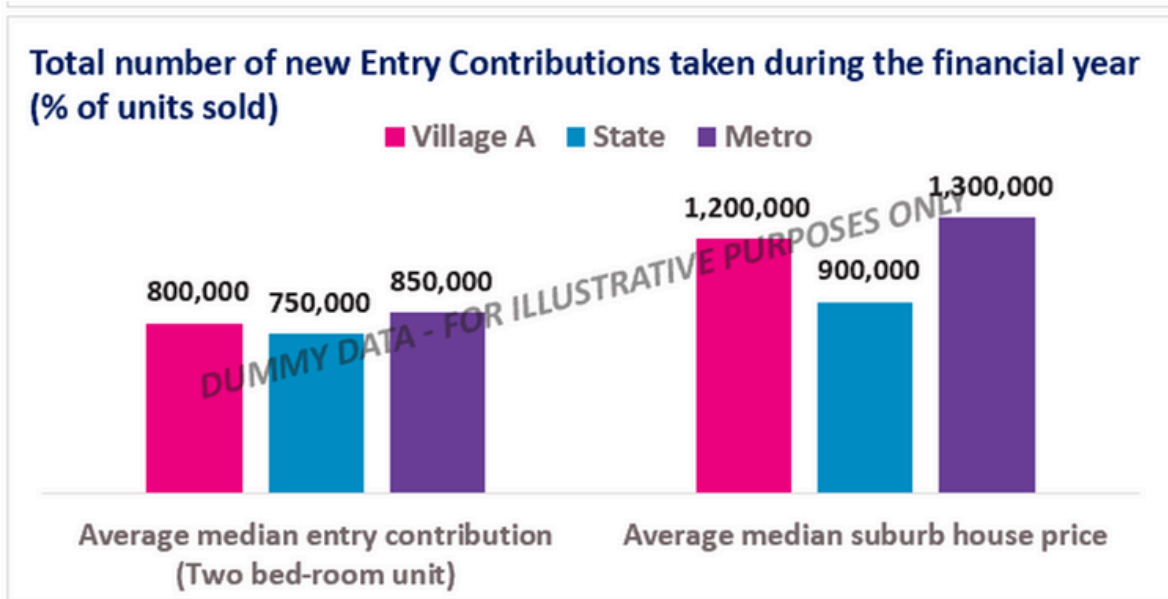
 <p>Varying size of organisations</p> <p>From one village operator to operators managing over 100 villages</p>	 <p>Both types of organisations</p> <p>Not-for-profit For-profit</p>	 <p>Multi-level focus</p> <p>National State Metro Regional</p>	 <p>Multiple contract structures</p> <ul style="list-style-type: none"> Traditional DMF model Alternative DMF model Land lease communities Assisted living Serviced apartments Senior rentals Senior social housing
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Full Report, Full Dashboard, Full Correlation Analysis

Each participating operator will receive a comprehensive Report plus comprehensive data to facilitate internal analysis, benchmarking and reporting to Board and other stakeholders.

 <p>Annual Sector Report</p> <p>Annual Participant report analysing each village against sector trends</p> <p>Interactive website including access to Business Intelligence (BI) and customised reports</p>	+	 <p>Board and executive presentations about the reports</p> <p>Annual Finance Forums</p> <p>Access to StewartBrown team</p>
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Sample metrics below:



Report investment required: \$500-\$700

The fee for participation will be negotiated with each operator, based on the sector, number of communities and number of residents.

An indicative once a year investment is approximately \$500-\$700 per community.

StewartBrown sector expertise

As an independent chartered accounting firm and benchmarking organisation, StewartBrown is engaged by over 150 retirement living operators, including nine of the Top 16 retirement village operators, representing over 950 villages.

Resident Satisfaction Report in 2025

In collaboration with DCM Research, a separate independent resident survey and Report will be carried out in 2025 for each community.

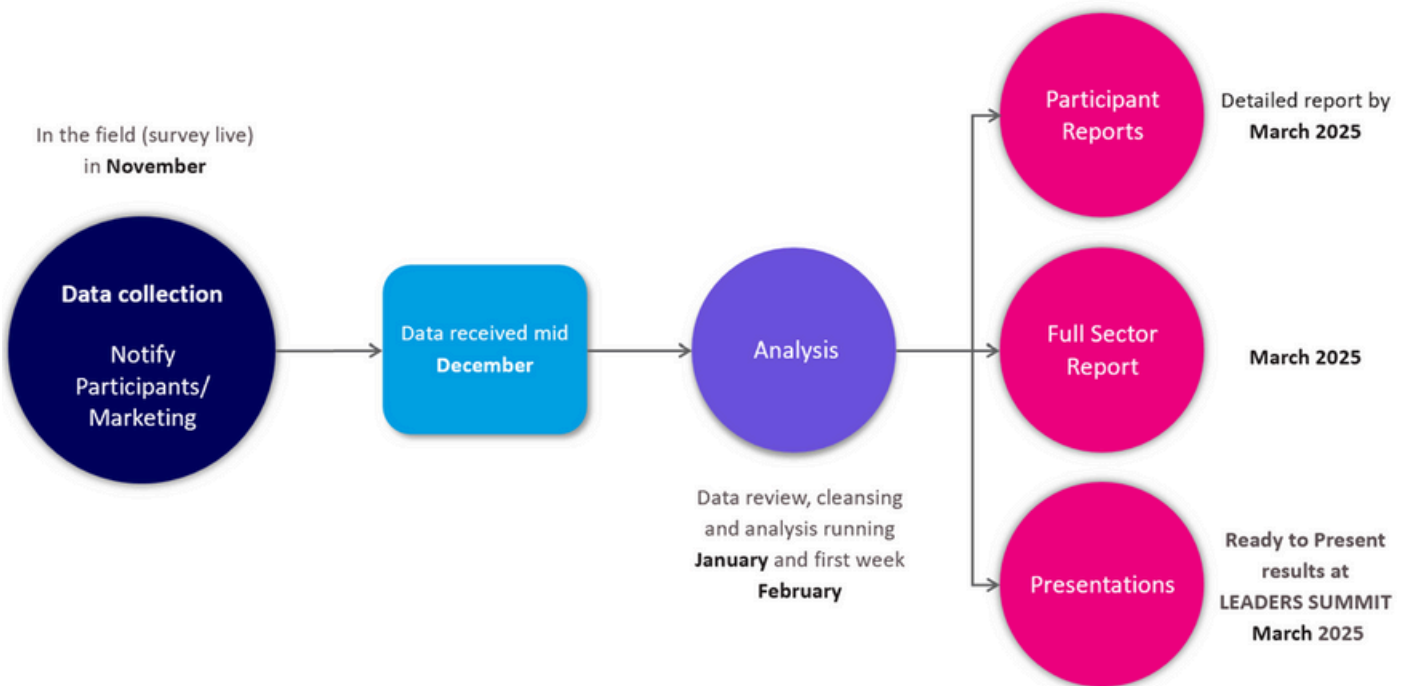
Addressing the Push and Pull factors plus an NPS score for each sector, the Resident Satisfaction Report will be available for cross analysis with care demands and other key metrics such as contract types and housing costs.



DCM Research has conducted large scale village resident research since 2008.

Enquire now – in field November / Report March

To participate, enquire now. The Report survey and data collection is timed for the ‘down time’ month of November, with the data, analysis and Report to be delivered in March.



Please contact us now to participate:

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