



Vision 2030

An Agenda for Growth

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The ARCO Annual Conference | #ARCOwhatnext

whatnext? 2018



Mission statement

- Our ageing population should:
 - Be valued for their contribution to society
 - Be treated with respect and dignity
 - Have access to good support, care and health services
 - Be enabled to live independently for as long as possible
 - Be able to play an active role in society and their communities

ARCO believes that older people should have the choice of living in a retirement community that facilitates independence, participation and offers the appropriate levels of care and support



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250,000 people living in retirement communities by 2030



10 priority areas by 2030



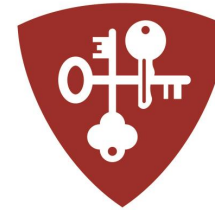
Effective self-regulation



A clear customer proposition



A highly trained workforce



Flexible models of tenure



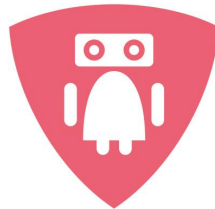
Sector-specific legislation



Clarity in the planning system



Comprehensive and robust data



Intelligent use of technology



Sustainable funding streams



Enhanced health and wellbeing



A clear customer proposition

- Customers confused by current offer
- Customers don't know about other options
- Need to define what our sector stands for
- Terminology is key



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Enhanced health
and wellbeing

- Response to modern phenomenon of longevity
- Healthy life expectancy not increasing as fast as life expectancy
- Focus beyond property on improving quality of life despite challenges of ageing



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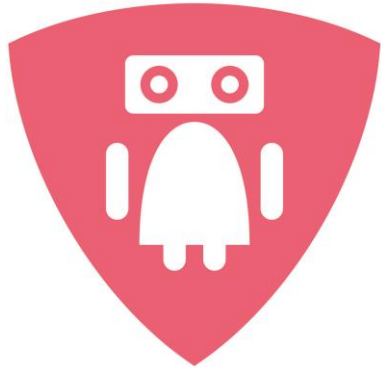
A highly trained
workforce

- It's a people business
- Sector specific training and progression
- Sector as employer of choice
- Become valued part of health and social care landscape

ARCO | Academy



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Intelligent use
of technology

- Underpins operational viability
- Increases quality of life for residents
- Ideal 'early adopters' for tech innovation
 - Human backup
 - Long term installation at scale
 - Less stigma



Bristol Robotics Laboratory



Comprehensive
and robust data

- Too little robust data on the sector
- Data needed to drive operational performance
- Data needed for lenders and investors

ARCO | Analytics

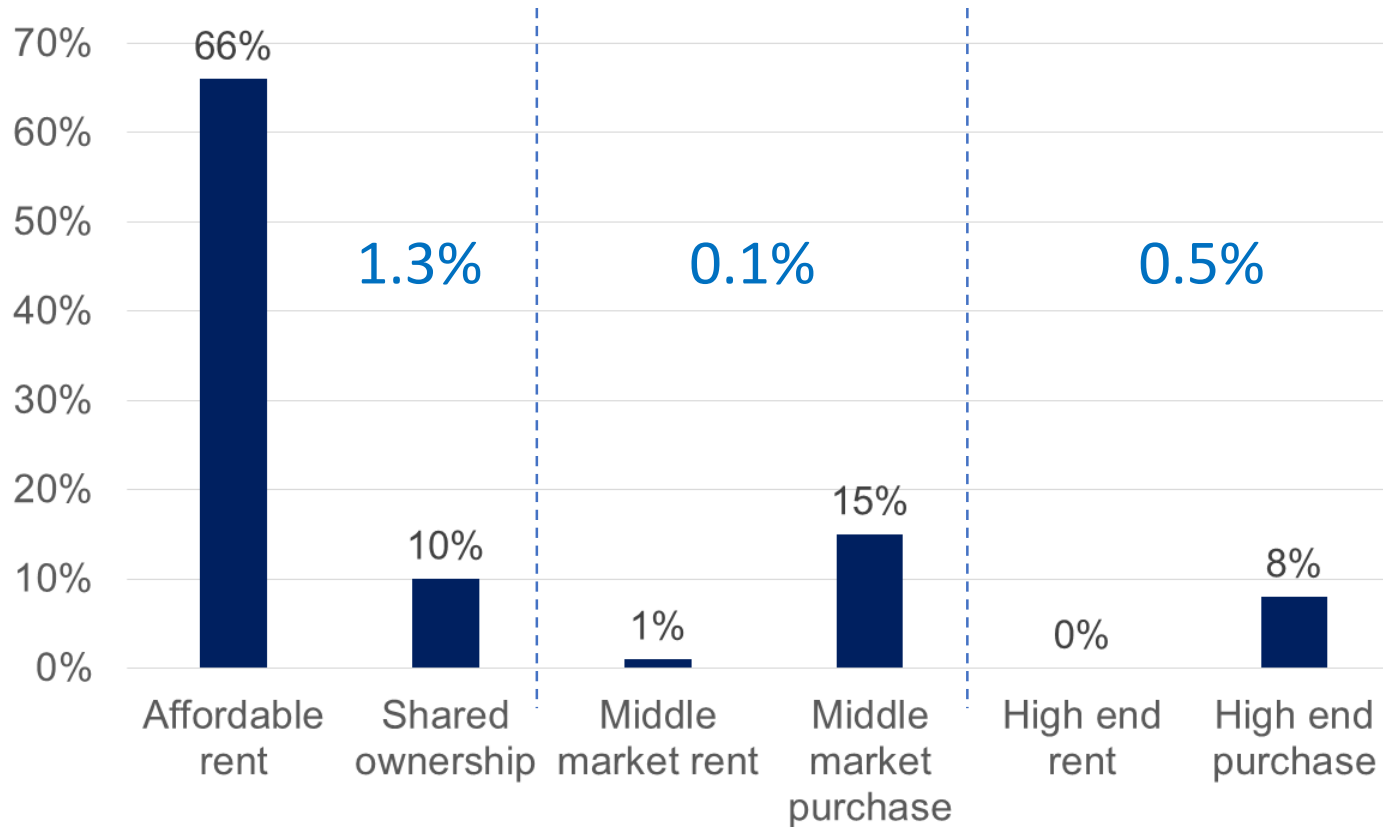


Sustainable funding
streams

- Diversity of the UK sector is our strength
- Ensure retirement communities remain options for all older people in the UK
- Funding and interaction with benefits and taxation system must consider impact on our sector



Shape of the housing-with-care sector





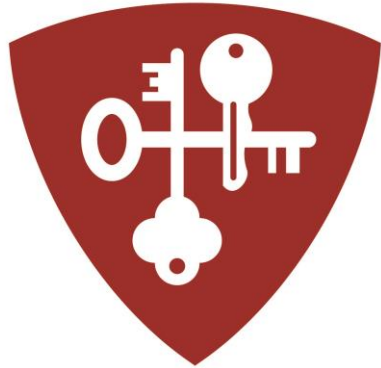
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Clarity in the
planning system

- UK planning system is failing older people
- Clarity needed that ensures the right types of housing for older people are built
- Should require local authorities to plan for minimum levels
- Specific use class or clarification on C2?

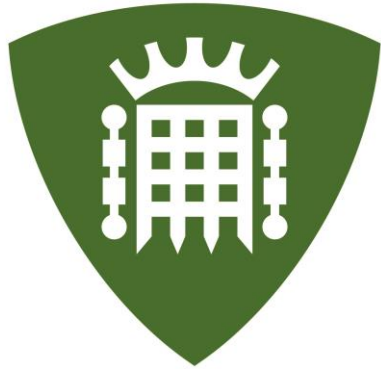


Flexible models
of tenure

- Leasehold: limited flexibility for both operators and new and existing customers
- Leasehold system is changing
- International context: Move away from leasehold structure
- Needs to be backed up by specific legislation



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Sector-specific
legislation

- Legislative ‘patchwork’
- Gaps in consumer protection and operator certainty
- Consolidation of disparate legislation
- Changing legislative requirements
- Follows international best practice and precedent (e.g. NZ Retirement Villages Act 2003)



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Effective
self-regulation

- ARCO Consumer Code in operation since 2015
- 200 assessments since then
- Aimed at preventing problems before they occur
- Bridges the gap until legislation comes into effect



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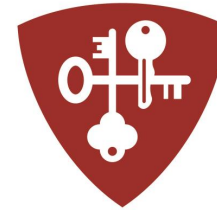
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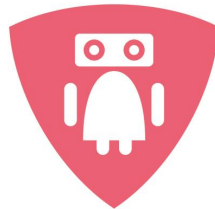
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Sustainable funding streams



Enhanced health and wellbeing



- Forms of the basis of ARCO's strategy
- Modern solution to a modern problem
- Work collaboratively with our members and partners to make it happen