



Ageing Well Report 2023

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Ageing well report 2023

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Welcome to the Ageing Well Report

Welcome to the Ageing Well Report 2023. This report shares information and insights from a national survey conducted in December 2022 with 2000+ Australians aged 25 – 75+ years. The findings provide a snapshot of current perceptions surrounding the ageing experience and the top priorities that are influencing our ability to live and age well today across economic, health, social and environmental factors.

The report also draws from the work of the Bolton Clarke Research Institute which, for over 20 years, has been at the forefront of aged care research and innovation.

We hope this first Ageing Well Report will promote further conversation around what it means to age well and how we can work together to support a positive ageing experience for all Australians.

1. Ageing well – an Australian context

1.1 Ageing well - an Australian perspective

The Royal Commission into Aged Care Quality and Safety found “as we age, we progressively shift our focus from work to other things that give us purpose and joy...yet... as a nation Australia has drifted into an ageist mindset that undervalues older people and limits their possibilities”.¹ The Commission found that making positive change begins with changing how we think about ageing – and that begins with understanding what ageing well means to us all.

Drawing from the central themes of healthy ageing frameworks, Bolton Clarke’s Ageing Well report asks how do Australians feel about ageing? What will we need to find purpose and joy as we age? And what does that mean for the services we need – at every age – to ensure people have the best opportunities to age well?

We surveyed 2000+ people across Australia to explore their ideas on ageing across four themes – Attitudes to ageing, Needs, Care and Finances. Their responses tell us that how we value older people – and what ageing well means to us – is changing.

1.2 Finding a framework for ageing well

Australia’s population is ageing. More than 4.1 million Australians, or almost 16 % of us, are currently over the age of 65².

By 2057, that will rise to 8.8 million, or 22% of the population, and by 2097 it will reach 12.8 million people, or one in four Australians³. An estimated 14% of boys and 19% of girls born today are expected to live beyond 100 years of age.

We’re not alone – 2023 is the third year in the World Health Organisation’s Decade of Healthy Ageing, with four identified focus areas including changing how we think, feel and act towards ageing; developing communities to foster the abilities of older people; delivering responsive integrated care and primary health services; and providing older people who need it with access to long-term care.

At the same time, governments around the world are seeking to understand the key ingredients to healthy ageing, with optimising people’s functional ability a priority by 2030. This means people’s ability to meet basic needs; to learn, grow and make decisions; to be mobile; to build and maintain relationships and to contribute to society.⁴

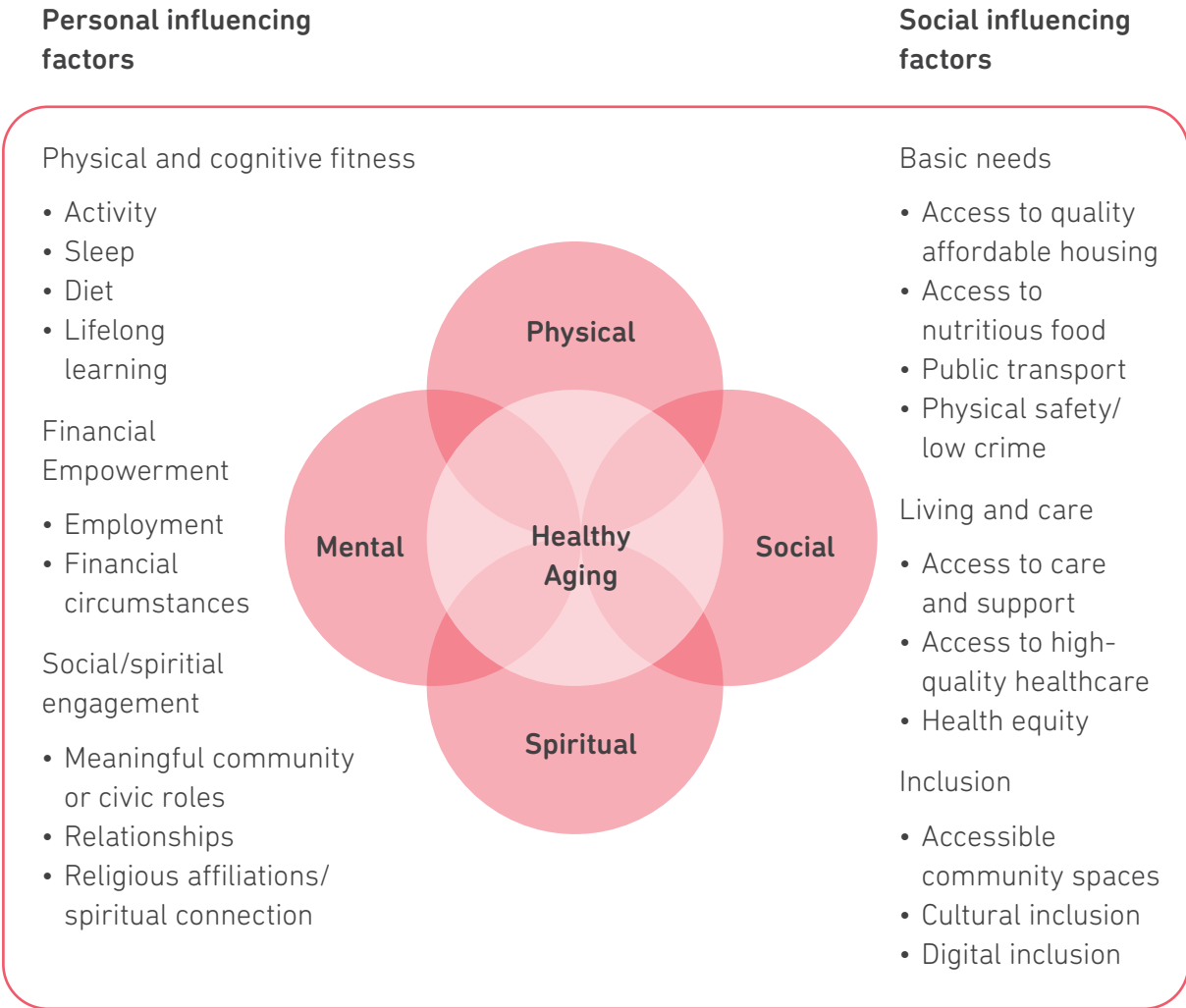
Understanding the elements of ageing well is important to inform government and industry decisions around how to deliver and fund responsive services. In Australia, this has been a focus of extensive research and policy debate, most recently through the Federal Government’s Aged Care Taskforce.

As far back as 2001, the Australian Government’s National Strategy for an Ageing Australia⁵ identified health throughout life – healthy ageing – as a key focus. Its primary goals related to sustainable and secure retirement incomes, positive attitudes – a society that recognises the

diversity and contributions of older Australians - and affordable, sustainable and accessible care. Today financial security, relationships, positive community attitudes to ageing and access to high quality care remain central to national and international efforts to develop workable healthy ageing frameworks for communities and individuals. In 2022 the McKinsey Health Institute proposed a framework that groups these themes into mental, physical, spiritual and social factors that contribute to an individual’s ability to age well.⁶

Drawing on these frameworks, we surveyed Australians on key topics relating to their attitudes to ageing, their priorities as they age, ideas on care and sources of financial security.

McKinsey Health Institute healthy aging framework



¹Interim Report Volume 1. Australian Government Royal Commission into Aged Care Quality and Safety, 31 October 2019.
²Australian Government Productivity Commission, Report on Government Services 2021, Part F, Section 14, 20 January 2021, accessed 22 January 2021, Table 14.A1 <https://www.pc.gov.au/research/ongoing/report-on-government-services/2021/community-services/aged-care-services>
³Australian Government Australian Institute of Health and Welfare, Older Australians at a Glance, 10 September 2018, accessed 12 January 2021, <https://www.aihw.gov.au/reports/older-people/older-australia-at-a-glance/contents/demographics-of-older-australians/australia-s-changing-age-and-gender-profile>
⁴Decade of healthy ageing: baseline report. Geneva: World Health Organization; 2020. Licence: CC BY-NC-SA 3.0 IGO.
⁵Commonwealth of Australia, National Strategy for an Ageing Australia 2001, accessed 13 July 2023, National Strategy for an Ageing Australia (ifa.ngo)
⁶Dewhurst, M., Linzer, K., Sandler, C., & Maud, M. (2022). (rep.). Living longer in better health: six shifts needed for healthy ageing (p. 5). McKinsey Health Institute.

1.3 Key findings

Ageing well means different things to different people. What's important to help people age well differs across generations and geographic areas.

We surveyed 2000+ Australians aged 25-75+ surveyed across Australia and found:

Attitudes

- More than nine in 10 agreed society can learn from the experiences of older people BUT less than half thought Australians respect older people in practice.
- Older people were least likely to agree that we as a society respect older people.
- ACT (53%) and NSW (43%) respondents were most likely to agree Australians respect older people

Priorities

- Financial security (20%), staying active (18%) and relationships (14%) were the three top ageing well priorities overall.
- Respondents aged 25-64 were most likely to list financial security as their top priority
- More than half of over 65s ranked staying active and access to health services as top priorities.
- Almost half of all respondents listed addressing loneliness as the most important mental health priority, topping the list in every age group.

Care

- One third of respondents said Australia cares well for older people. Older respondents were more likely to disagree.
- More than half of those aged 55+ said people were responsible for their own care.
- Half of all respondents aged 25-34 said families were most responsible for care.
- One in six over 55s said a new model of care is needed.

Finances

- Only 3% of respondents listed selling the family home as a top retirement funding source, with 1% listing family support.
- Superannuation was the top funding source with around half of all respondents listing it as their primary source of funds as they age.
- Young people aged 25-34 were more likely than any other group to list cash savings as a funding source as they age, with one in six listing cash as their top source.

1.4 Meeting the challenge

Understanding how Australians feel about ageing is an important step in responding to diverse needs and preferences. Overwhelmingly, respondents say the things they need to achieve it are financial security, an active and healthy lifestyle, family and community connections and access to quality care on their own terms.

These results will help inform initiatives needed to recognise the diversity of older people, provide access to appropriate services and support, bring people and communities together, create enabling public and personal environments and develop new models of care.



Teaching and learning across generations - Irene, 100, shares her experience on how to build a plane with Hartley, 3

2. What did we learn?

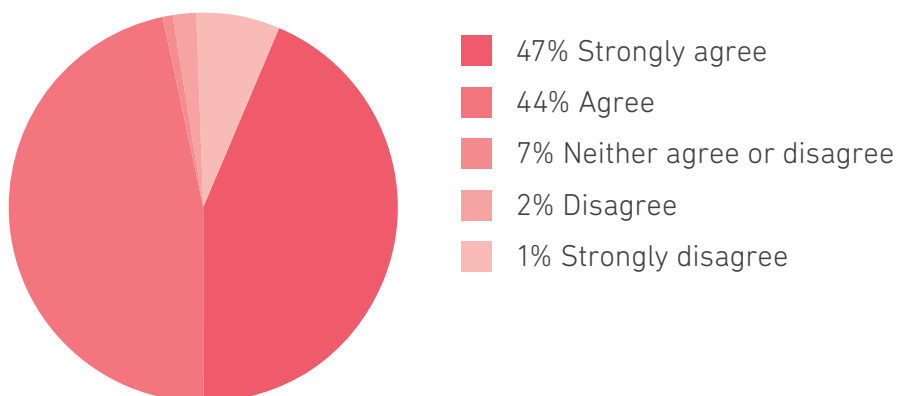
2.1 Attitudes to ageing and respect for older people

Most respondents (91%) agree society can learn from the experiences of older people. However there are differences of opinion when it comes to whether we respect older people's knowledge and opinions.

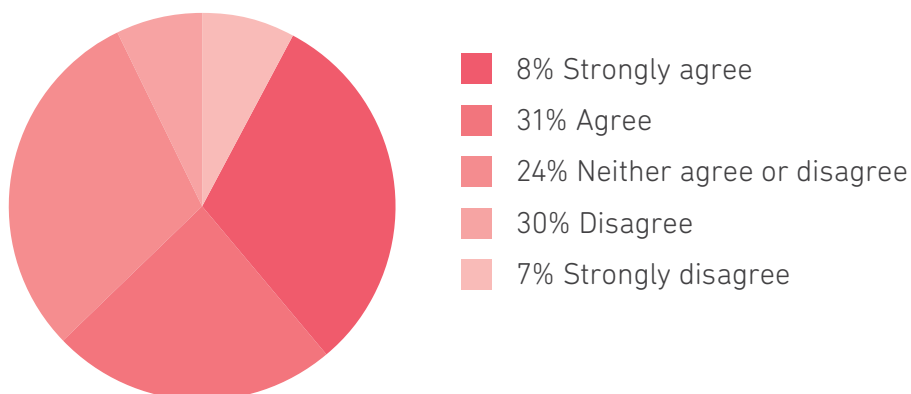
The youngest respondents (aged 25-34) were most optimistic with 54% agreeing we as a society respect the contribution of our elders. The percentage agreeing with that statement declined with each older age group before lifting again to 26% in the 75+ category.

ACT respondents were most likely to respect older people and to believe everyone else does too (53%), with Tasmanians least likely to agree that Australians respect older people (33%).

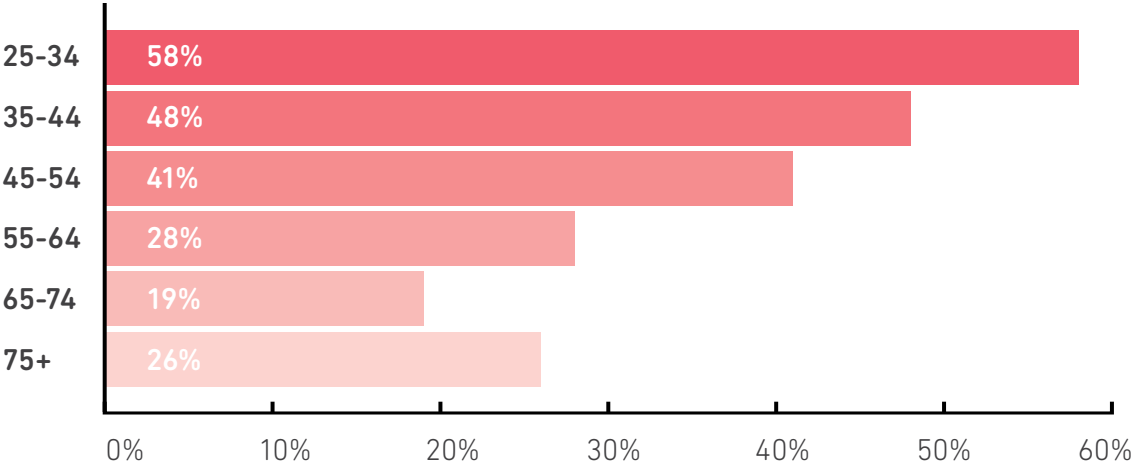
Do you think we as a society can learn from the experiences of older people?



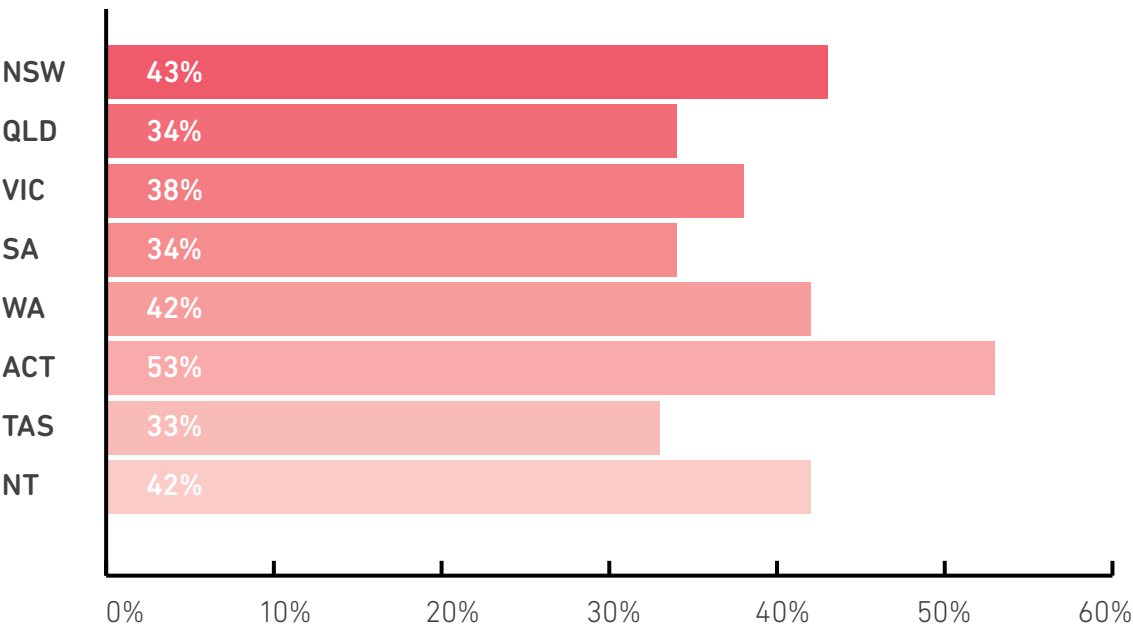
Do you think we as a society respect the knowledge and contribution of older people?



Respondents who agree we as a society respect the contribution of older people - by age



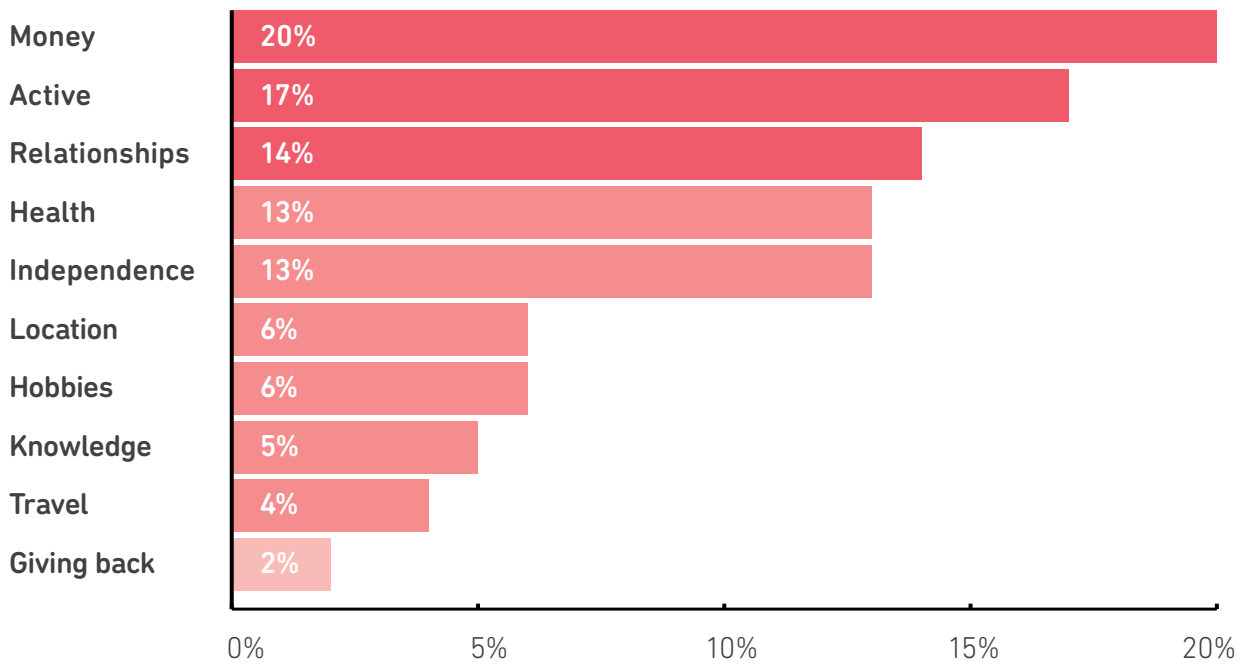
Respondents who agree we as a society respect the contribution of older people - by state



2.2 What do we need to age well?

One in five respondents said financial security was their top priority for ageing well. This was followed by staying active and eating well (17%), being socially connected (14%), access to quality health care (13%) and independence (13%).

What Australians need to age well, ranked from most to least important.

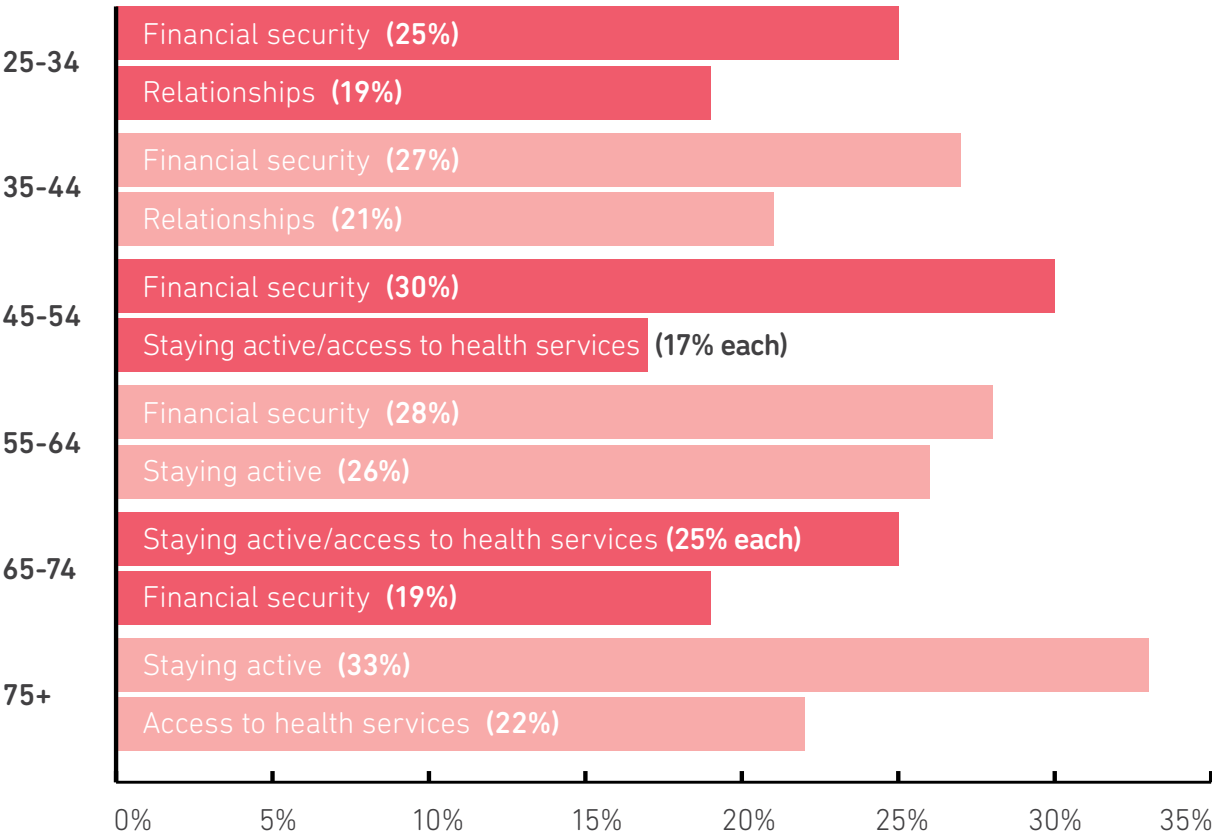


2.2.1 Priorities change with age

Responses around priorities changed with age, with staying active and access to health services becoming an increasingly high priority for older respondents, above financial security.

Respondents aged 65-74 were most likely to rank staying active and access to health services as their top ageing well priorities, with each ranked first by 25% of respondents in that age group. For those aged 75+, staying active was ranked first by 33%, with access to health services a priority for 22%.

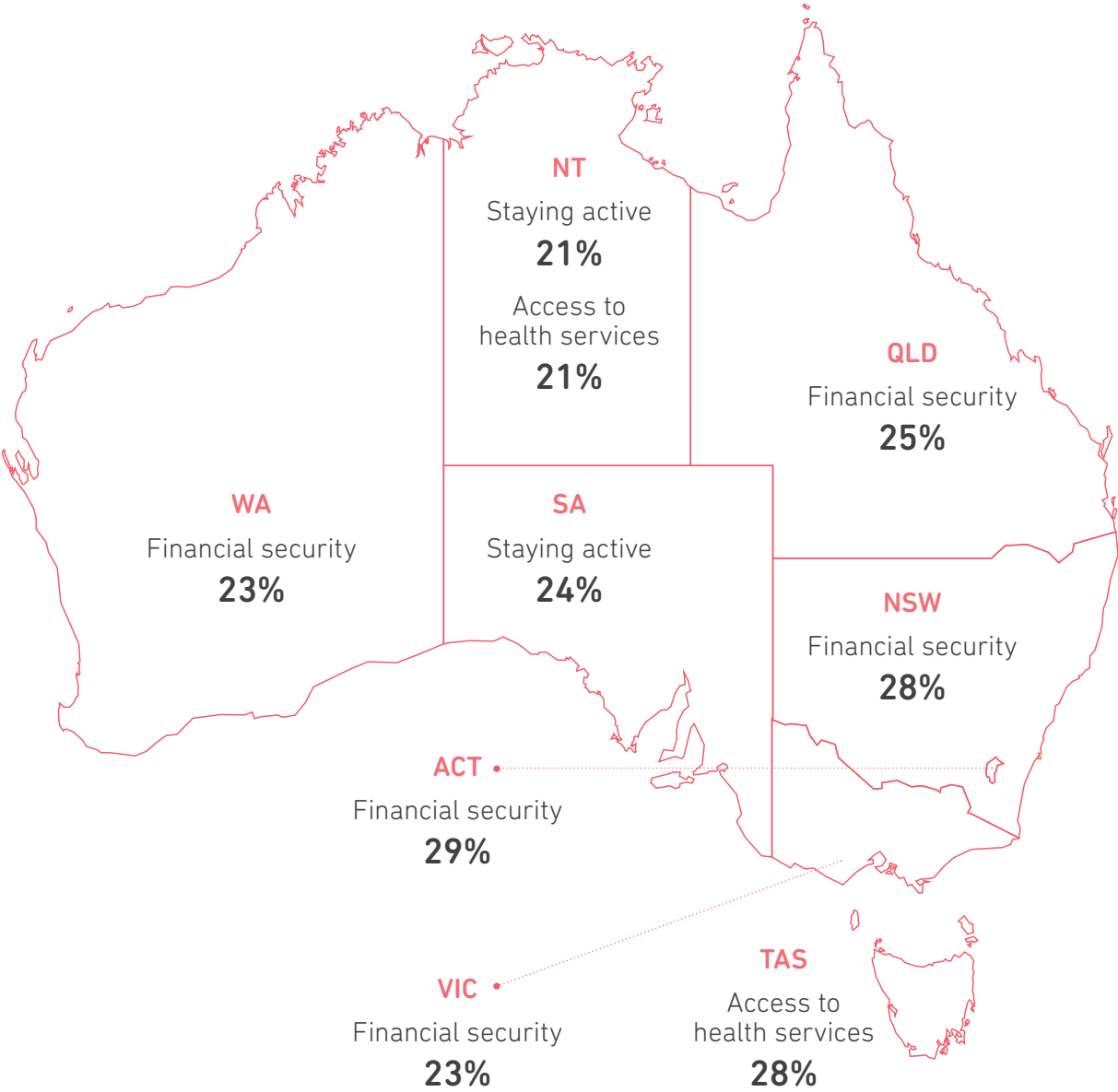
Top two ageing well priorities by age group



2.2.2 Ageing well priorities by state

Respondents from New South Wales, Queensland, Victoria, Western Australia and the Australian Capital Territory were most likely to rank financial security as their top ageing well priority. Tasmanian respondents were most likely to prioritise access to health care, with Northern Territory residents equally likely to rank an active lifestyle and access to health care first.

Ageing well priorities by state



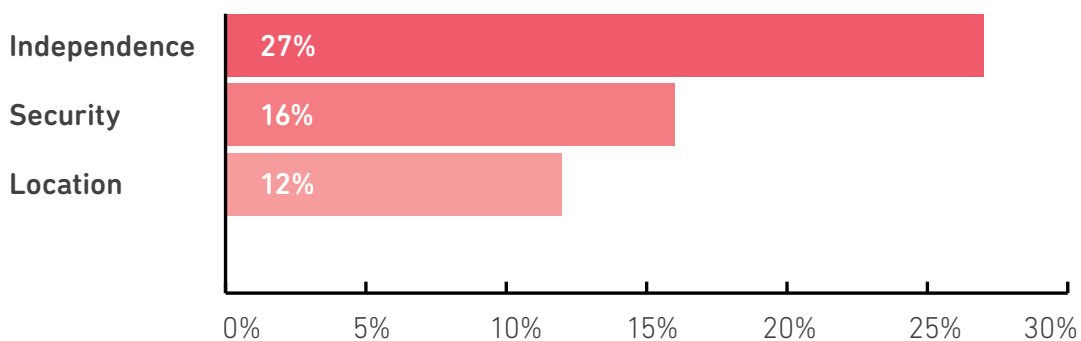
2.2.3 Ageing at home and in residential aged care

Priorities changed when respondents thought about ageing well at home vs in residential aged care.

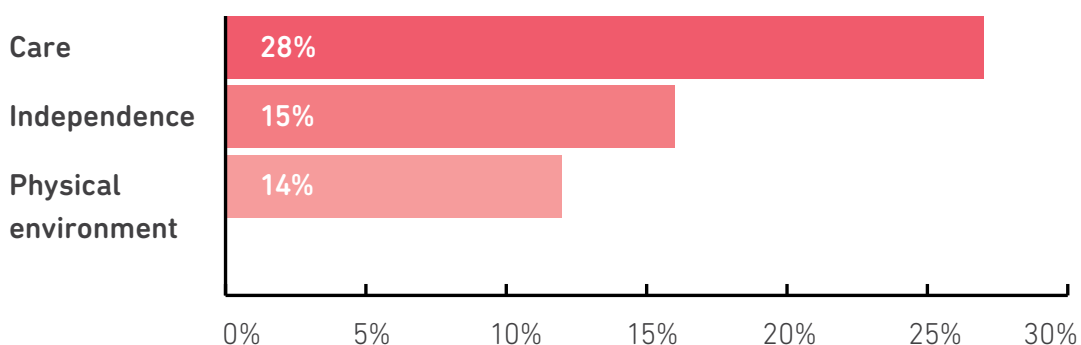
For ageing well at home, 27% of respondents ranked independence their highest priority, followed closely by security (ranked first for 16%) and location (12%). This preference was most marked for older age groups, with one third of people in each of the three oldest respondent groups listing independence as their top priority.

For ageing well in residential aged care, 28% of respondents ranked care first, followed by independence (15%) and a pleasing physical environment (14%). Food and security were next on the list at 9% each.

Ageing well at home – top needs



Ageing well in residential aged care – top needs



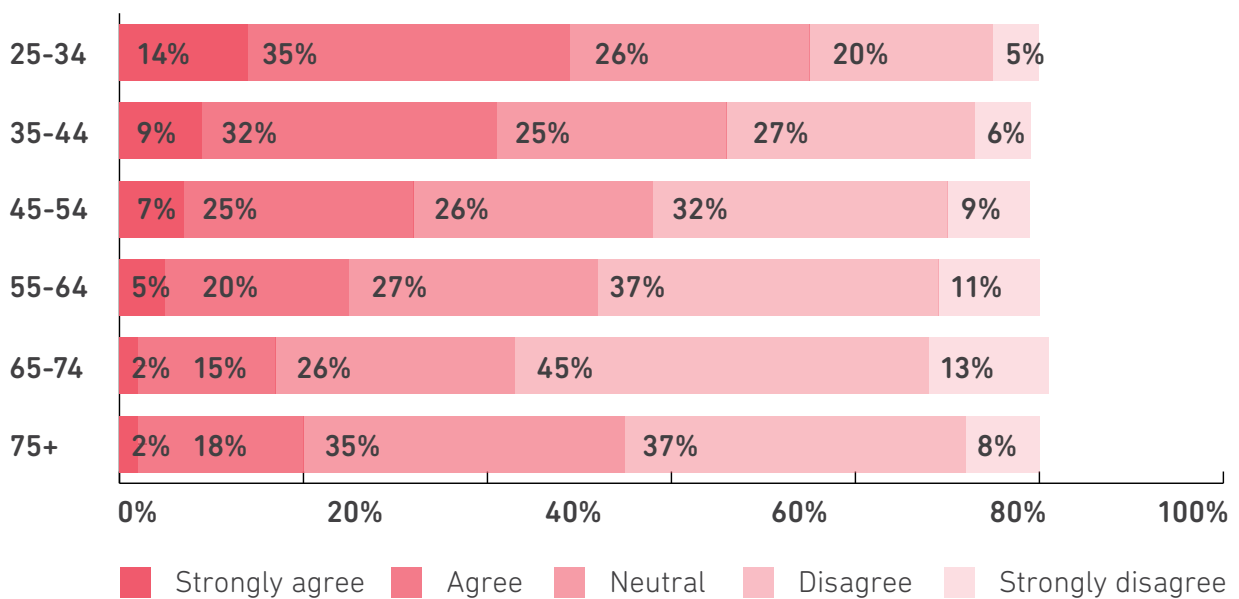
2.3 What do we think about care?

2.3.1 The current care model

More than one third of respondents (34%) strongly agreed or agreed that Australia cares well for older people, but respondents aged 55+ were much more likely to disagree. Almost half (48%) of respondents aged 55-64 disagreed or strongly disagreed with the statement, increasing to 58% of those aged 65-74.

Almost half (48%) of respondents aged 25-34 agreed Australia cares well for older people.

We as a society care for older people well

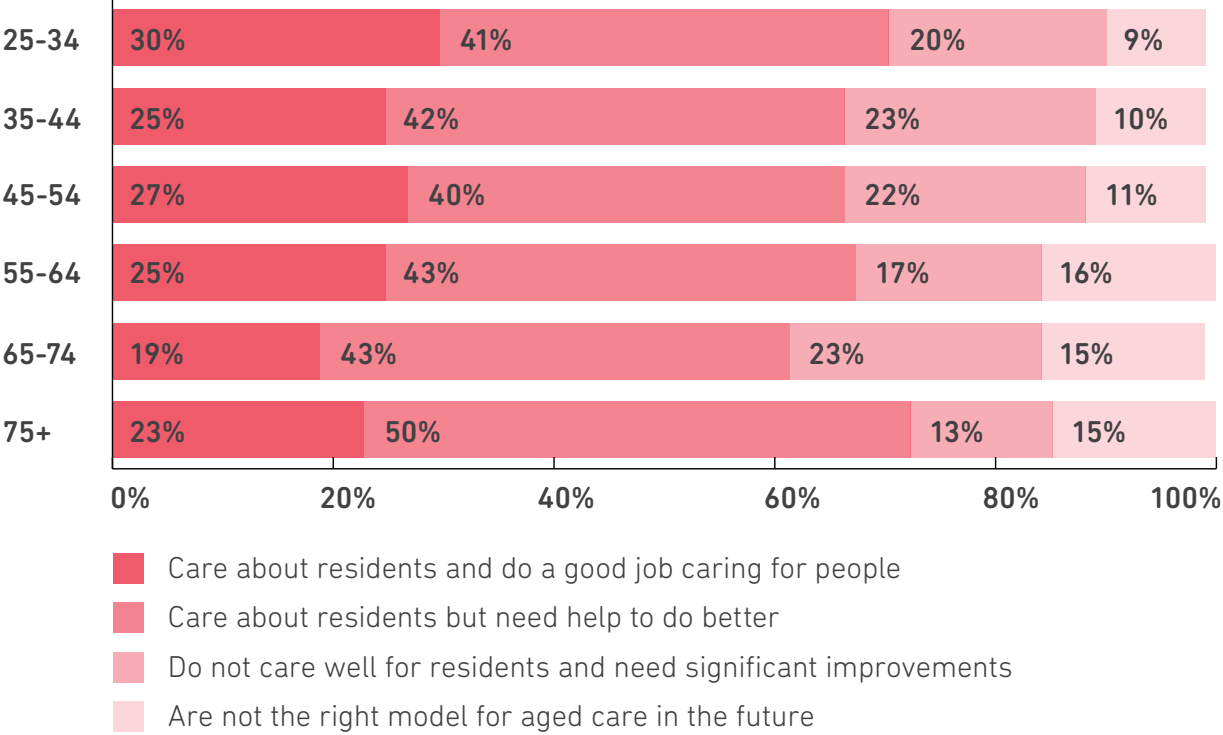


2.3.2 Ideas on residential aged care

While 68% of respondents agreed most residential aged care homes care about residents, 42% said they needed help to do things better. More than 40% of respondents in every age group said providers cared for residents but needed help to do things better, with one in two aged 75+ providing that response.

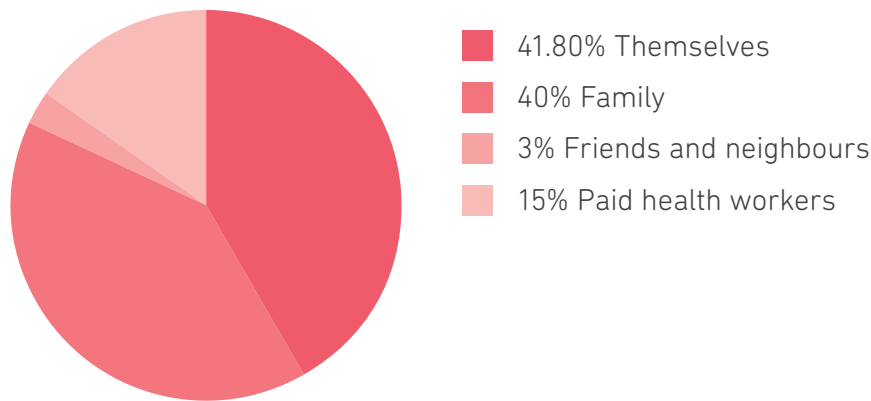
One in five respondents said aged care homes did not care well while 12% said a new model was needed to meet future needs. Respondents aged 55+ were most likely to say a new model is needed.

Residential aged care homes...



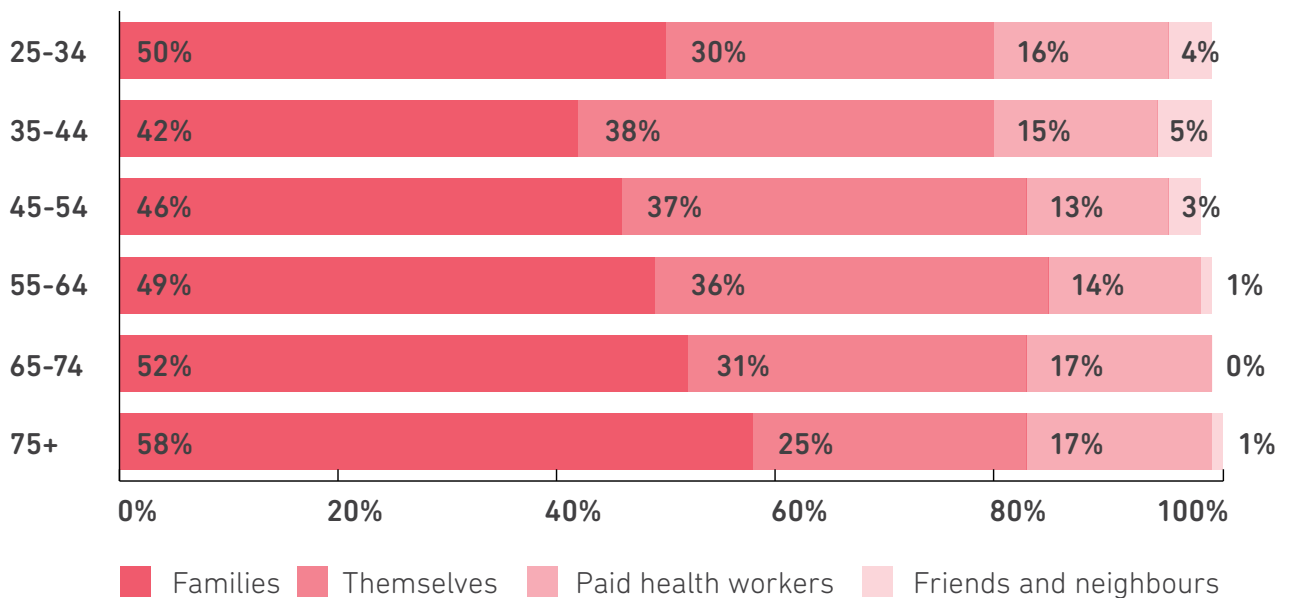
2.3.3 Who cares?

Respondents overwhelmingly ranked older people themselves (41.8%) and families (40%) as most responsible for direct care. Of all survey respondents, 15% ranked paid health workers as those most responsible for care, with only 3% ranking friends and neighbours first.



The youngest three groups of respondents were most likely to rank families as most responsible for care, while those aged 55+ were more likely to say individuals are responsible for their own needs. Across all age groups, friends and neighbours were least likely to be seen as responsible for care.

Who is responsible for caring for older people? Responses by age group.



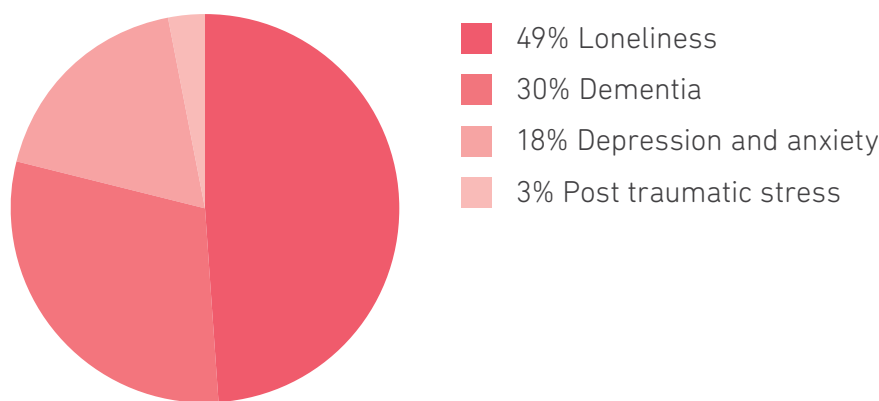
2.3.4 Social isolation a top health priority

Respondents across every age group and every state and territory were most likely to rank addressing social isolation and loneliness as the top mental health priority to help people age well. Almost half of all respondents ranked social isolation as the most important cognitive or mental health issue to be addressed.

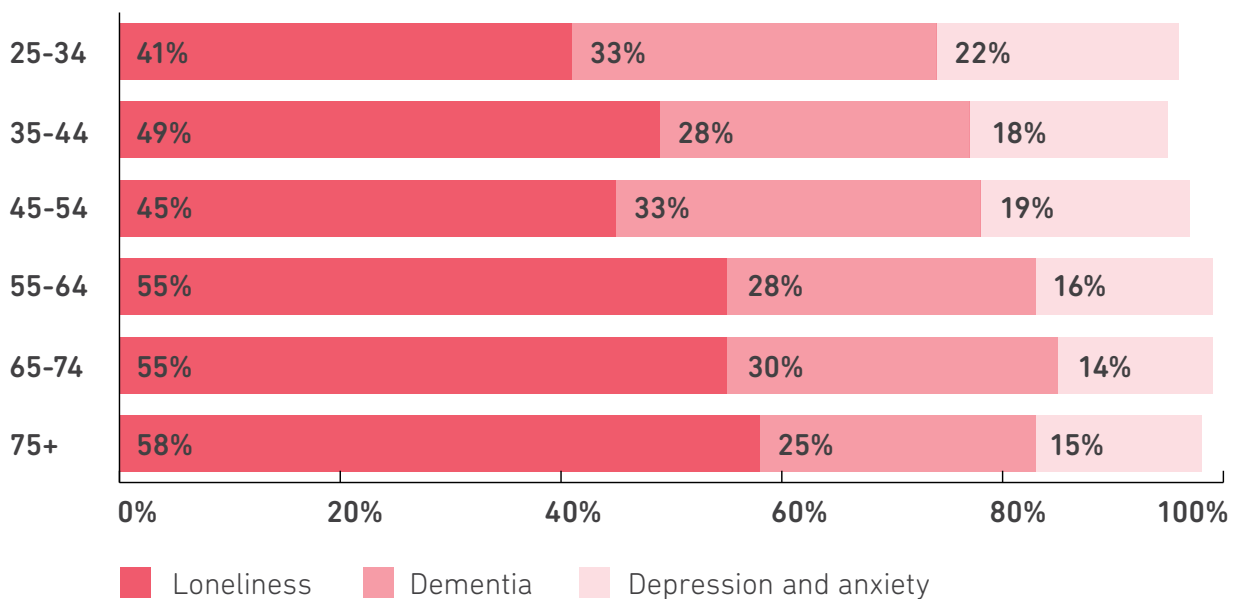
Older respondents were most likely to rank this as the top priority, with 55% of those aged 65-74 and 58% aged 75+ ranking it first compared with 41% of respondents aged 25-34.

Respondents from the ACT (56%) and Western Australia (54%) were most likely to rank loneliness as the top mental health priority, with South Australians least likely (43%).

Which cognitive and mental health issues most need to be addressed to help people age well?



Cognitive and mental health priorities - responses by age



2.4 Financial considerations

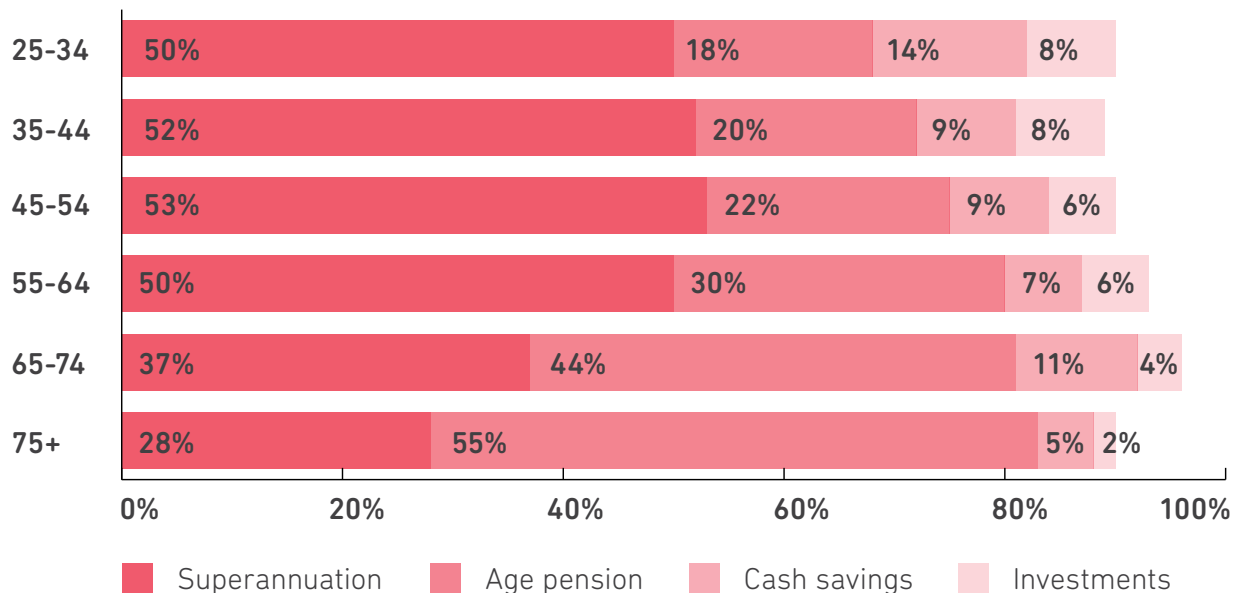
2.4.1 Sources of financial security

Respondents were most likely to rank superannuation and the Age Pension as their top two sources of retirement income.

Overall, 47% of respondents ranked superannuation first for funding their retirement, with 28% ranking the Age Pension first. Selling the family home (3%) and family support (1%) were least likely to be seen as major funding sources.

The number of respondents ranking the Age Pension as their top funding source increased with age, with most respondents aged 65-74 (44%) and 75+ (55%) ranking the pension as their top source of retirement funding.

Retirement funding sources - responses by age

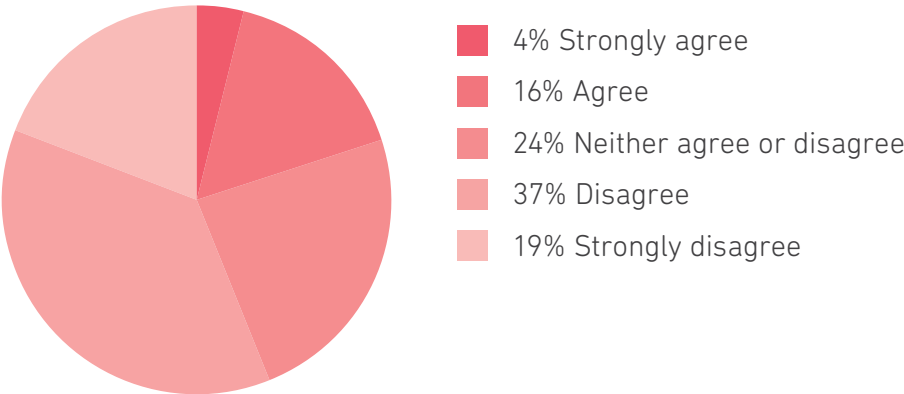


2.4.2 Aged care funding

More than half of all respondents (56%) did not agree with the statement that aged care is funded adequately in Australia. Only one in 5 respondents agreed or strongly agreed with the statement.

Across every age group respondents were most likely to disagree with the adequacy of aged care funding, with respondents in older age groups most likely to disagree. Respondents aged 25-34 were the most divided on the issue, with 41% disagreeing or strongly disagreeing compared with 34% agreeing or strongly agreeing.

Do you agree the aged care sector is funded adequately in Australia?





Jean uses smart technology to support an active and independent lifestyle at home and on the go.

3. Meeting the challenge – future directions

Ageing well is a lifelong process. Overwhelmingly, Australians say the things they need to achieve it are financial security, an active and healthy lifestyle, family and community connections and access to quality care on their own terms. Already, key policies and initiatives are helping meet those needs in new ways.

3.1 Bringing people together

Survey respondents identified social isolation and loneliness as the most important mental and cognitive health issues to be addressed to help people age well. There is growing evidence that loneliness is the next public health priority and is associated with increased risk of chronic health conditions.⁷ Initiatives that connect people and communities across generations and backgrounds seek to address loneliness at the individual and community levels.

Across communities: Non-medical interventions that connect people and protect against social isolation are an important part of new approaches to ageing well. Social connection through social prescribing is one way of addressing these important needs that can affect people's wellbeing.

Social prescribing initiatives take a wholistic approach to wellbeing, with health and community services co-ordinating to connect people with care and with their communities. Evidence suggests this approach is effective in improving health and wellbeing and reducing demand for secondary health care services.⁸

New to Australia, this approach has already proven effective internationally. In Sweden, where life expectancy is among the highest in the world, effective forms of preventative healthcare include prescriptions for physical activity monitored by doctors. In the United Kingdom, social prescribing is well developed and central to the government's long-term health care plans.

Across generations: Research shows intergenerational connections improve physical and mental health in older people and create a sense of purpose and belonging. Creating real opportunities to talk and do activities together is also one of the most powerful ways to break down ageist attitudes and negative ideas around ageing.

Programs like play groups or shared projects that bring older and younger people together regularly are most beneficial, with opportunities for each person to contribute in a meaningful way and make meaningful connections.

⁷Ogrin, R, Cyarto, EV, Harrington, KD, et al. Loneliness in older age: What is it, why is it happening and what should we do about it in Australia? *Australas J Ageing*. 2021; 40: 202–207. <https://doi.org/10.1111/ajag.12929>

⁸Drinkwater, C, Wildman, J, Moffatt, S. Social Prescribing. *BMJ* 2019;364:l1285



3.1.1 Case study: SHARE storytelling

Students from seven Australian universities across nine different degrees, ranging from journalism to science, nursing and social work, are currently involved in Bolton Clarke storytelling projects as part of the Bolton Clarke Research Institute's SHARE (Storytelling in Health Aged Care Research and Education) program.

Primary and high school students are working with retirement living and aged care residents across the organisation in multiple projects to create joint stories and share resident stories in creative ways.

For residents from Bolton Clarke's Westhaven retirement village at Toowoomba, Queensland, this meant working with Year 7 students at a high school in Plainland on a digital storytelling project.

Residents each worked with a group of Year 7 students and chose a story topic to explore in detail during weekly meetings.

Westhaven resident John says that he wasn't sure what to expect from the project, but he has been pleasantly surprised by his group and their willingness to listen to his stories.

"What amazed me with the five boys in my group was their liking for the outdoors and outdoor activities," he said.

"I've been telling them what life was like back in 1937 with the depression, the lack of money and work and lots of things not available - they find it very hard to believe."

The project has now become part of the school's Year 7 curriculum, with teachers reporting increased student engagement with English and history.

3.2 Access to health services and information

Technology: From virtual consultations and health advice lines to online education sessions, technology is equipping people to live well. Remote monitoring options developed or expanded during COVID restrictions are now closing geographic distances for people and health workers managing chronic conditions including wound care and diabetes.

The Internet of Things has already played a critical role in aged care during COVID-19, allowing residential homes to gather real-time health data and identify and respond to individual needs and potential outbreaks quickly, supporting better health outcomes and limiting disruption for residents.

Access to information: Health promotion and ensuring people have access to the information they need to live well is central to access to services. Programs and online resources that provide free access to health information in multiple languages are important to give people the tools they need to live well and also have the additional benefit of bringing people together and creating connections.

Addressing frailty at home: Knowing what's important to age well is one thing but overcoming the barriers that keep people from taking proactive steps to improve wellbeing must also be a focus.

Improving functional ability for older people is a key indicator in the World Health Organisations' planning for healthy ageing. Closer to home, it has been a focus after research showed a significant increase in falls among older people following COVID-19 restrictions.

Initiatives that have been co-designed with older people are helping people understand that symptoms of frailty can be reduced or reversed with simple strategies focused on movement, cognitive activity and mindfulness, social connection and a healthy and nutritious diet.



3.2.1 Case study: Being your best - frailty intervention

Research shows one unintended side-effect of essential health measures during the COVID-19 pandemic has been a loss of confidence and lower levels of engagement and activity, with home care and health providers noting a related increase in frailty among older people living alone.

Researchers from the Bolton Clarke Research Institute have worked with major Melbourne health providers and older people at risk of frailty to develop the Being Your Best Program. The evidence-based program, co-designed with older people, provides a holistic approach incorporating interventions around moving well, thinking well, connecting well and eating well.

Individual support is provided through community-based services with educational resources and coaching provided by the BCRI research team.

3.3 Enabling environments

The WHO identifies enabling environments in the home and community as essential to supporting needs and strengthening older people's wellbeing. Survey responses reinforced this priority.

To meet the expectations of new generations and cater for diverse needs, new design and services concepts are being implemented in Australia and internationally to give people more choices around ageing in place.

Co-located and integrated communities: Countries including Denmark, the USA, UK and New Zealand have led the way to replace the stand alone residential aged care model with integrated solutions.

In Australia, these models are rolling out as co-located village and care communities. Integrated urban vertical communities are designed to keep people connected with vibrant local areas and provide access to on-site services such as independent living apartments, home care, allied health and co-located residential aged care units along with facilities such as gyms, cafes and child care centres to help people live well.

Assisted living rooms and apartments: Often located in retirement living, residential aged care or integrated communities, these adaptive apartments enable delivery of residential aged care level support services into an independent living apartment designed for ageing in place.

This model allows couples with different support needs to continue living together in one apartment.

Multi-age communities: This model includes multi-age apartment buildings with services available as well as specialised communities. For example, in the United States there are more than 60 retirement living communities co-located with university campuses to give residents opportunity to be involved in academic and campus life.



3.3.1 Case study: Enabling environments

Bolton Clarke's Europa on Alma vertical retirement village incorporates an on-site gym, restaurant, barbecue and children's play area, art room, cinema and community garden with design to support independence and wellbeing.

On-site At Home Support services give residents access to nursing and allied health support, personal care and domestic health when it's needed.

Technology helps residents stay connected with a Lumin communications hub in every apartment giving access to apartment-to-apartment messaging, entertainment, phone and video calls and a wellness service.

The village also works in partnership with Ohmie GO to provide an on-site Tesla electric share car for resident use.

3.4 What comes next?

It's clear ageing well means different things to different people – and what it means for us changes as we move through the ageing process.

There is still work to be done to meet these needs for an increasingly diverse ageing population. Flexible and responsive care options as people's needs change with age are a critical component. So too is education and support for wellbeing across the lifespan so people enter their later years in better health and with greater opportunity to stay connected with the communities and activities that are important to them.

In Australia the work to design a sustainable and equitable aged care system that meets these needs is continuing – most recently through the Aged Care Taskforce.

Having a culture that respects and values people's ongoing value and contribution - no matter what their age - is central to the success of these efforts.

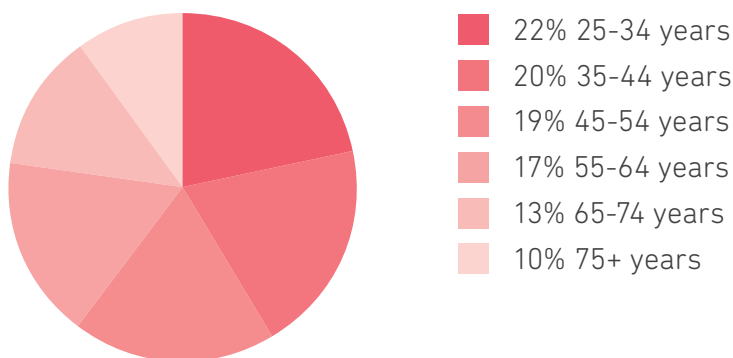
4. Appendix 1: Method

4.1 Who we asked

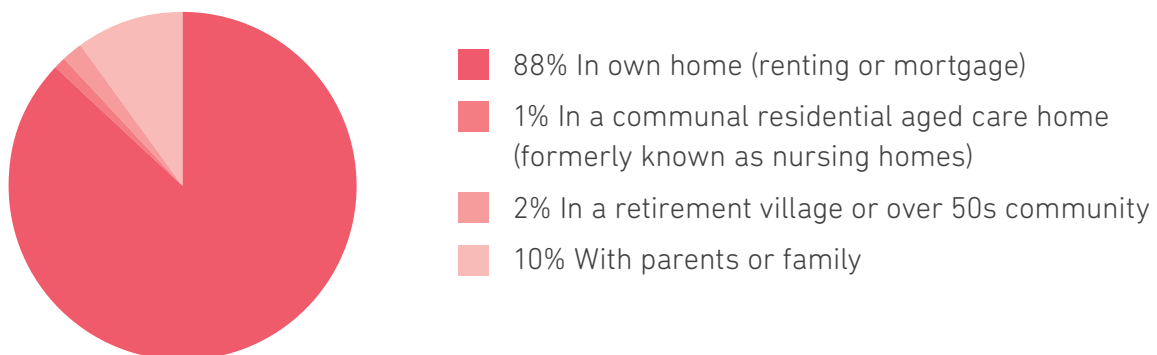
We conducted a telephone survey of 2008 Australians aged from 25 to 75+ in December 2022. Respondents were asked 18 questions about ageing well based on the themes attitudes, needs, care and finances.

The below graphs provide information about the survey group.

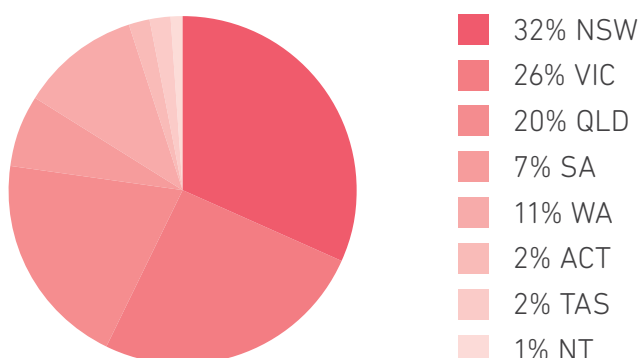
Age



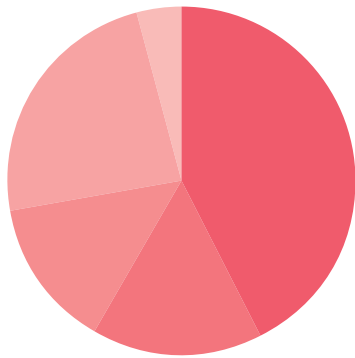
Current living arrangements



Location

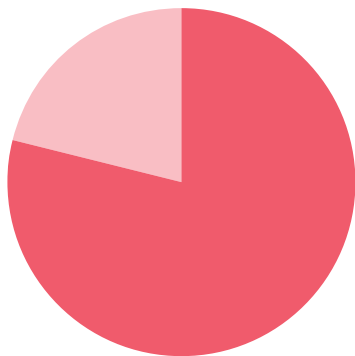


Work status



- 43% White collar worker
- 16% Blue collar worker
- 14% Do not work
- 24% Retired
- 4% Studying full-time (university or TAFE)

Place of birth



- 79% Australia
- 21% Overseas

4.2 Survey questions

1. What is your gender?
2. What is your current age?
3. Where do you live?
4. Are you:
 - a. Single
 - b. Partnered
 - c. Married
 - d. Divorced
 - e. Widowed
 - f. Prefer not to answer
5. Are you:
 - a. Studying full-time (university or TAFE)
 - b. White collar worker
 - c. Blue collar worker
 - d. Do not work
 - e. Retired
6. 6. Where are you currently living?
 - a. With parents or family
 - b. In own home (including renting or with mortgage)
 - c. In a retirement village or over-50s community
 - d. In a residential aged care home
7. Where were you born?
 - a. Australia
 - b. Overseas
8. Which of these is most important for living well in retirement? (Rank each from 1 being most important to 10 being least important)
 - a. Money – being financially secure
 - b. Active – staying active and eating well
 - c. Health – having access to good quality health care
 - d. Relationships – being socially connected to family and friends
 - e. Independence – staying independent and being supported to make my own decisions
 - f. Location – living close to transport, shops, family and friends
 - g. Hobbies – maintaining interests and hobbies that make me happy
 - h. Travel – regular travel to domestic and international locations
 - i. Knowledge – having good information about how to stay healthy

- j. Giving back – being able to contribute to my community
9. Do you think we as a society respect the knowledge and contribution of older people?
 - a. Strongly agree
 - b. Agree
 - c. Neither agree or disagree
 - d. Disagree
 - e. Strongly disagree
 10. Do you think we as a society can learn from the experiences of older people?
 - a. Strongly agree
 - b. Agree
 - c. Neither agree or disagree
 - d. Disagree
 - e. Strongly disagree
 11. Do you think we as a society care for older people well?
 - a. Strongly agree
 - b. Agree
 - c. Neither agree or disagree
 - d. Disagree
 - e. Strongly disagree
 12. Whose responsibility is it to care for older people in Australia? (Rank each – from 1 being the most responsible to 4 being the least responsible).
 - a. Families
 - b. Themselves
 - c. Paid health providers like doctors, nurses, social workers and other allied health professionals
 - d. Friends and neighbours
 13. How do you intend to fund your retirement? (Choose those that are appropriate to you, with 1 the most likely and 7 the least likely).
 - a. Superannuation
 - b. Cash savings
 - c. Age Pension
 - d. Part Pension
 - e. Investments/shares
 - f. Sell family home
 - g. Family support
 14. Do you agree the aged care sector is funded adequately in Australia?
 - a. Strongly agree
 - b. Agree
 - c. Neither agree or disagree
 - d. Disagree

- e. Strongly disagree
15. What do you think is most important for people who are ageing in their own home? (Rank each item from 1 being the most important to 11 being least important).
- a. Independence – having the freedom I need
 - b. Security – a place where I can feel safe
 - c. Location – positioned in a good location near facilities I like
 - d. Food – a balanced and nutritious diet that caters to my cultural needs
 - e. Care – the level of care available
 - f. Privacy – having the privacy I need
 - g. Layout – a pleasing physical environment
 - h. Culture – like-minded neighbours
 - i. Acknowledgement – being surrounded by people who acknowledge the achievements I have made in my life
 - j. Technology – wi-fi, iPads, mobile apps etc
 - k. Language – carers who speak my language
16. What do you think is most important for people who live in an aged care home? (Rank each item from 1 being most important to 11 being least important).
- a. Care – the level of care available
 - b. Independence – having the freedom I need
 - c. Food – a balanced and nutritious diet that caters to my cultural needs
 - d. Privacy – having the privacy I need
 - e. Security – a place where I can feel safe
 - f. Location – positioned in a good location near facilities I like
 - g. Layout – a pleasing physical environment
 - h. Culture – like-minded neighbours
 - i. Acknowledgement – being surrounded by people who acknowledge the achievements I have made in my life
 - j. Technology – wi-fi, iPads, mobile apps etc
 - k. Language – carers who speak my language
17. Which cognitive and mental health issues most need to be addressed to help people age well?
- a. Loneliness and social isolation
 - b. Depression and anxiety
 - c. Dementia
 - d. Post-Traumatic Stress
18. Which statement best describes what you know about residential aged care in Australia today?
- a. Most residential aged care homes care about residents but need help to do things better
 - b. Most residential aged care homes care about residents and do a good job supporting people with high needs
 - c. Most residential aged care homes do not care for residents and need significant improvements
 - d. Residential aged care homes are not the right model for aged care in the future.



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