



**Aged & Community
Services • Australia**



Where would we be without them?

**Research findings on the Aged and
Community Care Industry Image Project**

August 2008

Background

- McGregor Tan Research was appointed in December 2007 to undertake a research project to gain an understanding of how various key stakeholder groups viewed the aged care industry.
- The research was undertaken in March/April 2008 and included:
 - Executive Depth Interviews with twenty key stakeholders including:
 - Aged care providers from the for-profit and not-for-profit sectors
 - Allied organisations, including those from the health sector
 - Politicians and government officials involved in aged care
 - Corporate organisations with an interest in the aged care sector
 - Advocacy groups representing consumers/carers
 - Social commentators
 - A National Telephone Survey of 1,200 members of the General Public throughout all states and territories in Australia (weighted to people over 50);
 - An Online Survey of Providers throughout Australia, with CEOs and senior management within these organisations;
 - An Online Survey of Employees at all levels throughout Australia; and
 - A Self Completion Survey of Consumers throughout Australia
- The data collected in each survey is statistically valid and has a high degree of statistical accuracy. The results highlight that there is very limited variation in views of the aged care industry between states, genders and age groups.

Findings from the Executive Depth Interviews

Twenty stakeholders from media, government (including politicians), unions, industry, consumer representatives and social commentators were interviewed in depth to gain their views about the aged care industry. The comments they made reflect their individual views, and in some cases are incorrect, but they are instructive in terms of people's views and perceptions. The key findings from these interviews are summarised below:

- Industry doesn't have a good image due to negative media coverage and the way it portrays itself (always complaining about funding).
- The general population is not interested in aged care until services are needed for themselves or a family member.
- Older people themselves deny the need for services for as long as possible.
- Industry has been changing with increasing emphasis on community care and a frailer, older client group generally.
- There are mixed views on the role of retirement villages – whether they are a lifestyle accommodation option or an alternative to low level residential care.
- The role of low level residential care in the future is questionable (they may be replaced by retirement villages) with a view that high and low care have morphed into one service type.
- There are concerns about social isolation and transport for community care clients as well as workers being unsupervised.

- The provision of high level residential care is at risk due to capital funding issues and falling occupancy rates.
- People felt that there were good and average providers (but very few bad) in both the private and the not-for-profit sectors.
- The pay and difficulty of the work were identified as the main barriers to attracting staff to work in aged care.
- The importance of the aged and health care interface was acknowledged but with mixed views about whether or not there should be greater integration of the two.
- Dementia is an issue of great concern. There is widespread confusion over “specialist dementia care” and “dementia specific care”.
- It was suggested that people with dementia have difficulty accessing residential care, particularly in the private sector. It was alleged that (all types of) providers refuse services to people with dementia because they are “high maintenance”.
- Industry needs to have a better image but given the media’s focus on young people it was seen as a difficult task.
- Industry needs to present older people in a more realistic and better light, including differentiating between the different age groups (e.g. 55+, 85+ etc).
- Providers reported “lying low” to avoid media attention.
- Industry needs to conduct research in order to understand what consumers want as it has never done this.
- Consideration was given to how industry could re name itself but there was no consensus on what would be better than aged care.
- Interviewees identified future plans and directions the industry should pursue including – calling Government’s bluff, a “Garnaud” style review and report, research on consumer needs and choices, consumer directed care, more competition and addressing capital and regulation issues.

Interviewees were not asked about industry representation issues but it was raised spontaneously by some participants. It was not seen as a big issue with mixed views being expressed about the need for a merger of the 2 national peak organisations.

Findings from the General Public Survey

The general public survey interviewed 1,200 people via telephone. The sample was weighted towards the 50+ age group because they would be more likely to engage with aged care as a topic. There were also respondents in younger age groups. The sample was drawn from all states and territories in Australia.

The survey was wide ranging and included questions on perceptions, media, quality, promotion and aged care as a place to work.

Key findings from the survey include:

- The majority of people surveyed thought the aged care industry was important with just under half having an expectation that care should be provided for elderly people.

- 3 in 5 respondents had personal experience (2 in 5 through families and friends) with aged care which influenced their perceptions. This was a much more important source of information than any form of media.
- Responsibility for aged care was seen as belonging to Government (Federal and State), families, older people themselves and aged care providers. These groups were also seen as being involved in aged care along with medical professionals, community organisations and families and friends.
- Over one third of respondents expected industry to provide high quality services as well as medical care and housing/accommodation at an affordable cost.
- More than half said the quality of care was an important factor in choosing a service along with adequate health care, staff reputation, location, recreational facilities and cost.
- The overwhelming majority of respondents felt that people’s choices were dictated by finances.
- Only 1 in 5 people believe the needs of older people are being well met. More than half of the people interviewed felt that people’s needs were not being met believing that the standard of care wasn’t acceptable.
- 2 in 5 respondents indicated they would be most likely to recommend not-for-profit providers to family and friends. A further 30% would recommend a charitable provider with only 10% saying they would recommend a for-profit provider (15% were unsure).
- One third of those interviewed were aware of recent media coverage of aged care. Almost half of these respondents felt that the media coverage was negative.
- More than half surveyed believe the community has mixed views about aged care. They did not have a clear view of how these perceptions impacted on aged care.
- When asked what messages the industry should use to promote itself almost two fifths of those surveyed indicated that industry should show that it cares, respects, supports and listens to the elderly and looks after them well. They nominated television, newspapers and radio as the best mediums for promotion.
- Responses to attitudinal statements showed a high level of agreement that:
 - elderly people and the aged care industry need more government support;
 - the industry plays a critical role in society;
 - industry should focus more on promoting a healthy and positive lifestyle for older people; and
 - industry needs to promote a more positive image of the good work it does.
- The performance of volunteers, carers and nurses is rated quite highly.
- One third of respondents said aged care was an industry in which they would like to work.

Findings from the Consumer Survey

Consumers were able to fill out a hard copy survey or respond online. Surveys, and/or the weblink, were distributed by aged care providers, COTA and Carers Australia. There were 925 responses.

Overall consumers were positive about the industry with half of those surveyed believing that their needs were being well met. When asked to describe their thoughts about the industry they said it was “under resourced” and “under valued”.

Other key findings include:

- The overwhelming majority of those interviewed stated that they tell their families and friends positive things about the services they receive and three quarters portray a positive image about the industry.
- Consumers identified the quality of care, having needs met, quality of accommodation, being made to feel valued, being able to spend time with staff when they need to talk, access to information, timeliness and cost of service delivery as the most important aspects of the services they receive.
- Generally consumers were satisfied with these aspects with 4 in 5 saying they were satisfied overall. However the lowest areas of satisfaction were with being able to spend time with staff, timeliness and cost of services.
- One third of consumers wanted or needed additional services (within their current services) including having greater access to staff, a greater range of activities and a wider choice of, and better, meals.
- One quarter of consumers identified other services they needed but were not currently receiving including:
 - a greater range of doctors, physiotherapists, dentists and other medical specialists at affordable prices;
 - overnight respite and respite when needed;
 - access to affordable transport to assist with visits to medical specialists, shopping and community outings; and
 - a greater range of garden maintenance services supplied to the home.
- Consumers expect industry to care for the elderly and provide:
 - Affordable, high quality services;
 - Nursing/personal care,
 - Information about available services,
 - Housing and accommodation;
 - Recreational services; and
 - Counselling services.
- However, almost half of the consumers responding did not believe that there is adequate consultation with older people about their wants and needs.
- Consumers believe there are mixed views about the industry with 1 in 10 thinking that there is a positive view and a further 15% believing the view is negative. 2 in 5 were aware of recent media coverage and half thought it had a negative influence.
- Consumers identified all forms of media and family and friends as key influencers of perception. They believe that the negative perceptions impact on industry's ability to attract and keep staff & volunteers and delays families deciding to use aged care services.
- Consumers attributed high levels of performance to nursing staff, volunteers and carers while they associated lower levels of performance to church and charitable organisations, cleaners, cooks, residential care, retirement villages, community care, doctors/specialists, and privately owned and operated services.
- Messages that consumers thought industry should use to promote itself included the quality of care provided, consumers satisfaction, accreditation of services and staff, the services available and that ageing is a healthy part of life.

- The mediums identified to best deliver these messages were television, newspapers, radio, direct mail, the internet and industry networks.
- Consumers suggested that the industry needs to:
 - Employ and attract more staff by paying higher wages;
 - Provide more places, nursing homes, facilities and resources to meet current and future demand;
 - Obtain more funding for home care;
 - Obtain more funding from Government.
- Consumers associate the industry with being caring, practical, responsible and providing hope and needed/wanted services. They believed that the word “industry” should be dropped from the aged care name to portray a more positive perception. Suggestions for its replacement include “services”, “assistance”, “support”, “elder care” or “seniors assistance”.

Findings from the Employee Survey

This online survey was provided throughout the ACSA Federation and particularly by service providers bringing it to the attention of staff. A total of 1,000 surveys were completed.

Almost all employees felt that the aged care industry was important to society. Employees described the industry as under resourced, under funded and over regulated with employees being over worked and under valued. However, three quarters of those working in aged care were satisfied overall.

Other key findings include:

- The main attractions to work in aged care were identified as making a difference, helping people, work colleagues and that it was a rewarding career. The negative aspects cited included the rates of pay, the community’s negative perception and that the industry is financially driven.
- The important aspects of aged care work were:
 - A sense of achievement;
 - Fairness at work;
 - Relationship with the supervisor;
 - Participation in decision making;
 - Actual day to day activities;
 - Availability of relevant training and remuneration.

Employees were least satisfied with their remuneration.

- The majority of employees say they portray a positive image of the industry and more than half indicated that they would recommend working in aged care.
- More than half of the employees interviewed stated that they would continue to work in aged care even if they could get a similar position in another health related area.
- Increased pay or remuneration was identified by most as a way of making aged care more attractive to them and to prospective employees.
- Employees believe there are mixed views about the industry with the media influencing the community to have a negative outlook on nursing homes. This negativity was seen to make it difficult to attract staff and lead to the community avoiding/delaying use of aged care services.

- Other sources such as the experience of family and friends and personal experience created a positive outlook.
- Employees had high expectations of the quality and affordability of the care/services provided by industry. They rated the performance of volunteers, carers, nurses and charitable services quite highly.
- Fewer than one third of employees felt that the needs of people receiving aged care were being met due to there not being enough services and health professionals available. They identified the cost of services as being too high with three quarters stating that people's choices were dictated by their financial resources. In addition employees felt that older people were not consulted adequately about their needs.
- The aged care industry should promote itself as caring, compassionate, understanding and supportive using positive testimonials. They also felt the quality of life in facilities and that working in aged care is a rewarding career should be promoted. The best mediums for these messages were identified as television, newspapers and radio although significant proportions also named the internet, direct mail and industry's own network.
- It was suggested that salaries and staffing levels should be increased and that industry should lobby Government for more funding and to increase the number of facilities available.
- In all responses nurses had the most negative perceptions of, and attitudes towards, the aged care industry.

Findings from the Provider Survey

The online survey was promoted throughout the ACSA Federation to all members with 665 responses. This survey targeted the views of CEO's and Senior Managers within aged care services.

Key findings include:

- Nearly everyone thought that aged care was important to society although the community had mixed views about the industry.
- Only 5% felt there was a positive view of the industry although overwhelmingly providers say they portray a positive image of the industry to family and friends.
- Providers believe that community's perceptions are predominantly influenced by television news and current affairs shows as well as experiences of family and friends, newspapers and radio.
- A high proportion (two thirds) was aware of recent media coverage. The coverage was seen as negative.
- Nine tenths of providers believe that the negative perceptions make it hard to attract staff.
- They rated the performance of volunteers, carers, nursing staff and charitable organisations highly.
- Industry should promote itself on television, radio and newspapers using the following messages:
 - Importance of old people
 - A caring, compassionate and loving environment
 - Ageing is a fun and good part of life
 - Professional, high quality care and services
 - Enriching and ensuring good quality of life

- One third of providers thought there was a better name for the industry which would promote a more positive image. The main suggestions included elder care, seniors living/care, caring for older Australians and mature living.
- Two thirds of providers believed that people's needs were being met.
- Reasons for needs not being met included a lack of health professionals, standard of service by staff and poor processes and procedures. Providers felt that people's social needs were not being met.
- Over half of those surveyed did not think there was adequate consultation with older people in relation to their needs being met.
- More than two thirds said aged care was an attractive industry in which to work with a very high proportion recommending it to family and friends.
- Just over one fifth of respondents said they would not work in the industry if they could get a similar position in another health related areas.
- Providers associated aged care as an admired, community focussed and cost effective industry which is caring, practical and responsible.

Overall Key Findings:

The following key points can be distilled from the analysis of all the survey and interview data:

- Aged care is considered to be of critical importance to society across all stakeholder groups with two thirds of the general public indicating they had personal experience of the industry.
- Federal and State Governments, families, aged care providers and older people were seen to be the main groups responsible for responding to the needs of older people. The research highlighted that there was a general consensus among all of the stakeholder groups that the aged care industry, and elderly people themselves, need more government support.
- There is a broad range of perceptions of the aged care industry amongst all stakeholder groups ranging from extremely positive to extremely negative.
- Many people hold the view that there is a negative community perception of aged care. Employees and providers had the most negative view of community perceptions. The research does not bear this out - where people had experienced aged care they had quite positive views of the industry as did the general public. The consultants noted this stating that the industry has a "siege" mentality that needs to be addressed.
- The main influences on people's perceptions were identified as personal experiences, experiences of friends and family and the media, particularly through news and current affairs programs on television and newspapers. While current affairs or news stories are not the major influence on the general public's view of aged care where they had seen coverage it left a negative perception. The research highlights the need for the industry to promote a more positive image of the good work it does using television, newspapers, radio, the internet, its own networks and direct mail.
- The research highlighted that people have a different view of the different types of providers with a more positive perception of not-for-profit, church and charitable providers than government or private providers.

- There were mixed responses to how well the needs of older people are being met. Consumers however had a high level of satisfaction with 9 in 10 stating they were satisfied with the services they received. All stakeholder groups had a strong belief that older people, and those who are ageing, are not adequately consulted in relation to their current and future needs and wants.
- Employees research identified four areas that need to be addressed – remuneration, lack of promotional opportunities, industry being financially driven and the (alleged) negative community perception. Nursing staff are the most negative of all employees recording the lowest levels of satisfaction with their current situation as well as optimism for the future.

Essence of the Brand

- The research findings were used to determine what the ideal essence of the aged care industry brand is. The essence includes attributes, benefits, personality and the “heart” of aged care.
- The research showed that the aged care industry “owns” a number of brand associations with the top three being:
 - An industry I admire;
 - Community focused; and
 - Caring
- This lead to the brand positioning being identified as “*Where would we be without them?*” This phrase should guide the development of images and messages to positively promote the industry.

Next Steps:

ACSA will now develop a campaign to promote a positive image of the aged care industry. ACSA will contract with a public relations firm to develop a campaign based on the findings of the research. ACSA will also conduct briefing sessions with key stakeholders.

ACSA will provide regular progress updates on this key industry project.

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