

FOCUS

A close-up, low-angle shot of a showerhead with water droplets falling, set against a blue background. The water droplets are in various stages of falling, creating a sense of motion. The showerhead is white and has many small holes. The background is a solid, light blue color.

Carterwood Focus
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A comprehensive research study into
wetroom provision in UK elderly care homes



The last ten years have seen significant changes to the facilities provided in UK care homes for older people. As consumer choice in the economy has widened, aided and abetted by the growth and influence of online channels, so expectations of what should be available for some of the oldest and most frail in society have quite rightly shifted too. However, we should not delude ourselves.

Any notion that what might be considered standard in everyday life has been mirrored in the care arena is misplaced. There can be little doubt in anyone's mind that there has been under-provision in the elderly care sector, but the full extent of this gap has remained, until now, a mystery.

We therefore thought it was time someone looked at this subject in depth, and our starting point has been ensuite wetroom provision.

What we did

Our comprehensive survey was undertaken over six months and based on more than 6,000 telephone interviews. The research includes data from the whole of the UK and comprises information from private, not for profit, local authority and some NHS care homes.

In circumstances where we were unable to contact a care home directly we were able to make a number of assumptions based on data from other sources, such as the A-Z Care Homes Guide and the Care Quality Commission (CQC).

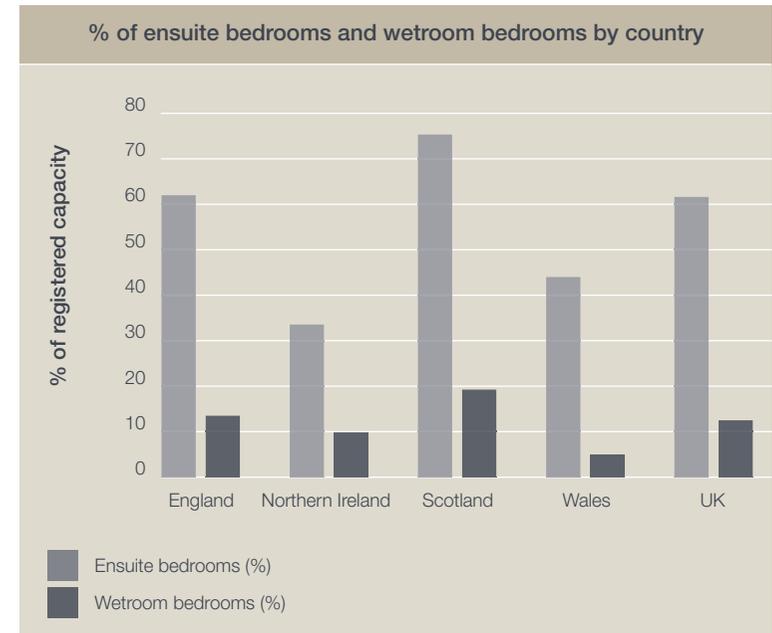
Definitions

Ensuite bedroom – where there is at least a WC and wash hand basin and may also include a shower cubicle, bath or wetroom.

Bedroom with an ensuite wetroom – where there is a full wetroom, i.e. a walk in shower complete with level access as well as the WC and wash hand basin.

13.8%

wetroom provision in the UK



What we discovered

- There is an even bigger gap in provision than we had anticipated.
- Only three large groups operate 100% wetroom provision. Of those operating over 2,000 bedspaces only two deliver 95%, but this certainly highlights the direction of travel for the corporates.
- Not surprisingly, the national average masks some considerable variation amongst the regions but the extent of this was greater than we had anticipated.

Scotland has the largest wetroom provision of any country

19%



 Only **13** postal towns in the UK have a 100% wetroom provision

Average UK provision for wetrooms is just

14%



London has

14%

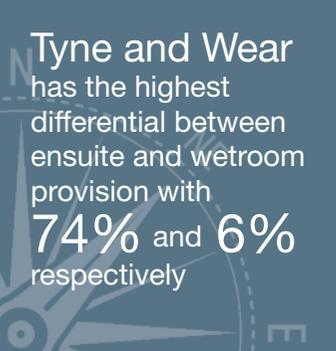
wetroom provision



At just **5%** Wales has the lowest wetroom provision of any country



Tyne and Wear has the highest differential between ensuite and wetroom provision with **74%** and **6%** respectively



37% Buckinghamshire has the highest provision of any county

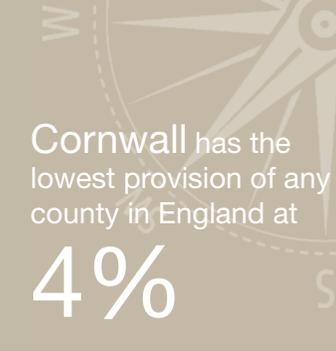
Northern Ireland has the lowest provision of ensuite bedrooms for any country

39%



Cornwall has the lowest provision of any county in England at

4%



Average UK provision for ensuite bedrooms

62%



819 postal towns have less than 10% wetroom provision

South East has the largest wetroom provision of any English region at

19%



Greater Manchester has a low wetroom provision

7%



612 postal towns do not have any wetrooms



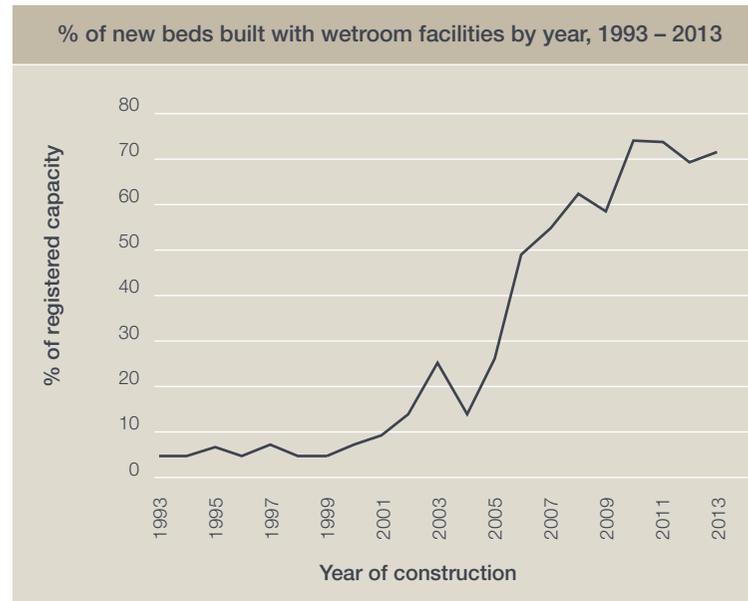
North Yorkshire has the highest wetroom provision of any northern county at

18%



Looking at future trends

Whilst our analysis indicates that across the board there is a pretty low bar on this key accommodation quality indicator, there are encouraging signs that more and more new builds contain - or are set to contain - wetroom facilities.



Of the 300 feasibility studies completed by Carterwood for proposed elderly care homes over the last three years, over 95 per cent of the subject schemes have incorporated wetrooms in their design.

We anticipate that this trend will continue. We are also seeing the size of wetrooms increase: five years ago wetrooms were in the order of 2.5 sq. m, but this has now increased to 3.5 to 4 sq. m.

We do not see provision of ensuite wetrooms increasing significantly in areas such as the North East and North West of England unless there is an increase in baseline fee rates, which given the current local authority constraints is unlikely.

We are also seeing an increase in the number of operators looking at re-configuring existing accommodation to incorporate ensuite wetrooms. Much of this activity comes from operators who offer a very high standard of personalised care and consider that the provision of an ensuite wetroom will ensure that their services are fit for purpose.

To attempt to analyse this further, we reviewed historic building data over the last 20 years. The results show a large increase in wetroom provision from 2002 until 2013 (with a slight dip in 2004). From a 10% figure in 2002, this has increased significantly to 70% of all new builds in 2013; a 60% shift in just 11 years.

How can you access all the data?

The data we hold, and its comprehensive interpretation, has been cross referenced against wealth profiles, care sectors, type of care home and fees.

From November 2014, all of this information can be included in our consultancy reports, adding a unique perspective when seeking to analyse current provision of care home bedspaces.

For more information about Carterwood or to find out how we can help you please telephone 08458 690777

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