



# Village Guide Research, June 2025

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How older New Zealanders and their families navigate the  
decision to move into a retirement village

# Sections

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- 01 **Survey overview**
- 02 **Market sizing**
- 03 **Consumer journey overview**
- 04 **Emotions experienced**
- 05 **Operator brand perceptions**
- 06 **Summary & implications**

01

# Survey overview

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# Methodology and sample

## Methodology

- 15-minute online survey
- Fieldwork run between 16th May and 8th June 2025

## Details

- To qualify for the survey, all respondents were recruited to ensure they were:
  1. Considering a retirement village in the next 5 years or have a family member considering doing so
  2. Aged 65+ (prospective residents)
  3. Aged 45-69 years (family members)
  4. Family members were screened to ensure they had some degree of influence on their family member/friend's decision to move into a retirement village
- Data weighted to reflect nationally representative sample by age, gender and region

## Panel sample

	Prospective residents	Family members	Total
Panel sample	396	185	581

## Market sizing – New Zealander’s over 65

	Residents	Non-considerers	Prospective residents (within 5 years)	Prospective residents (moving in 5+ years)	Total
Sample	327	2,378	396	81	3,182

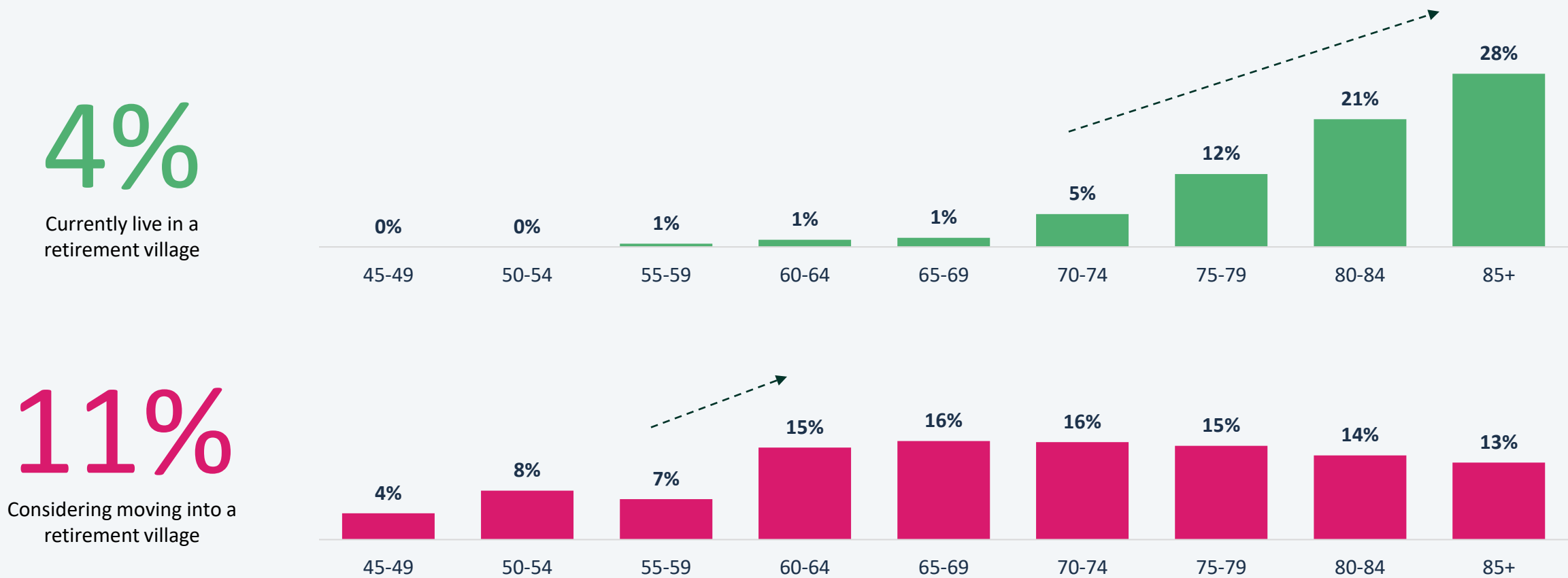
02

# Market Sizing

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# Current retirement village living situation (total population aged 45+)

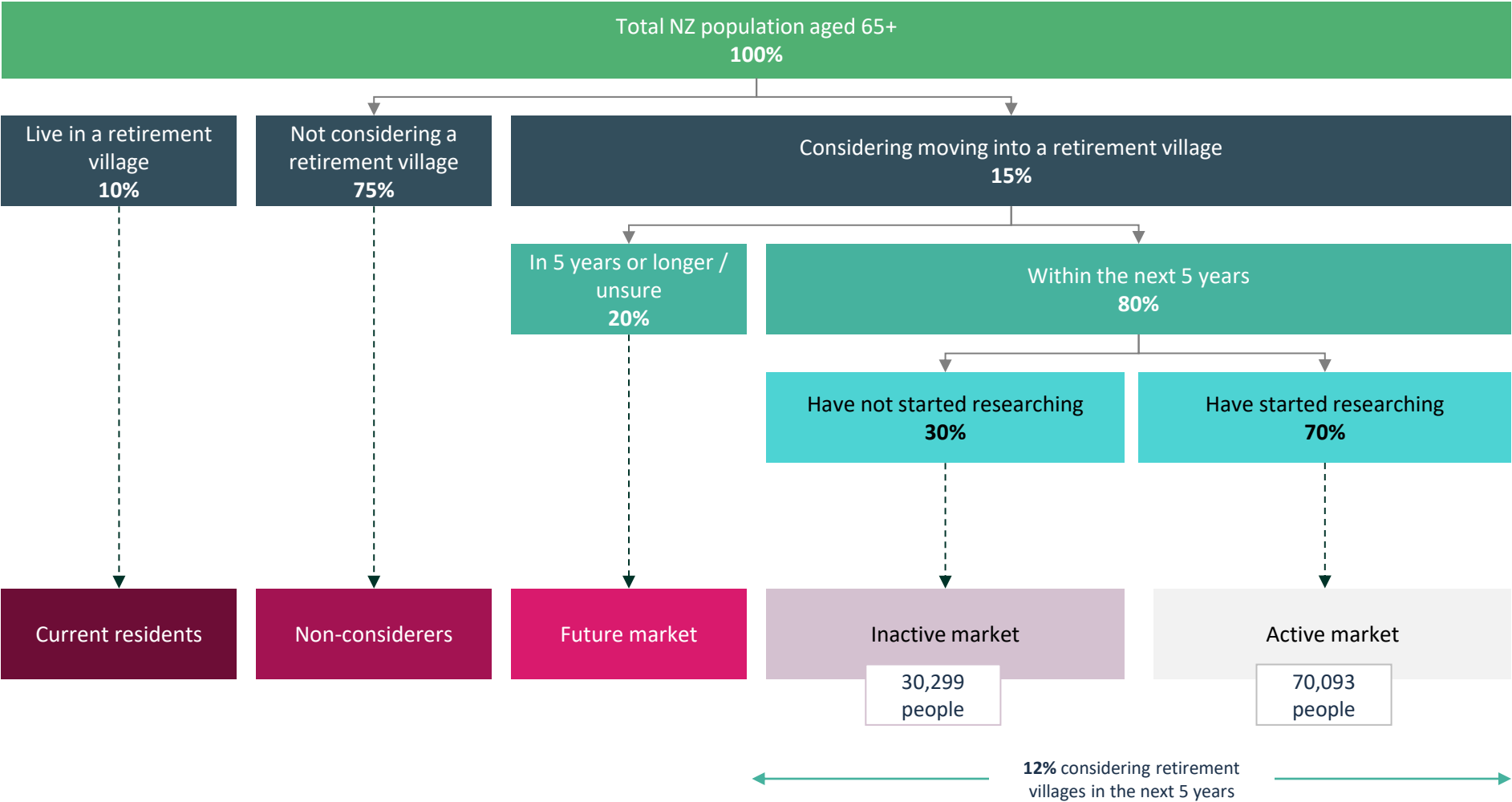
Retirement village living begins around age 70, but consideration starts earlier and increases significantly around age 60.



BASE: ADULTS AGED 45+ IN NEW ZEALAND, NATIONALLY REPRESENTATIVE (N=4,783)  
Q. WHICH OF THE FOLLOWING BEST REPRESENTS YOU?

# Market sizing (Adults aged 65+ in New Zealand)

12% of adults aged 65+ are considering moving into a retirement village within the next 5 years



Which of the following best represents you?

How soon are you considering moving into a retirement village?

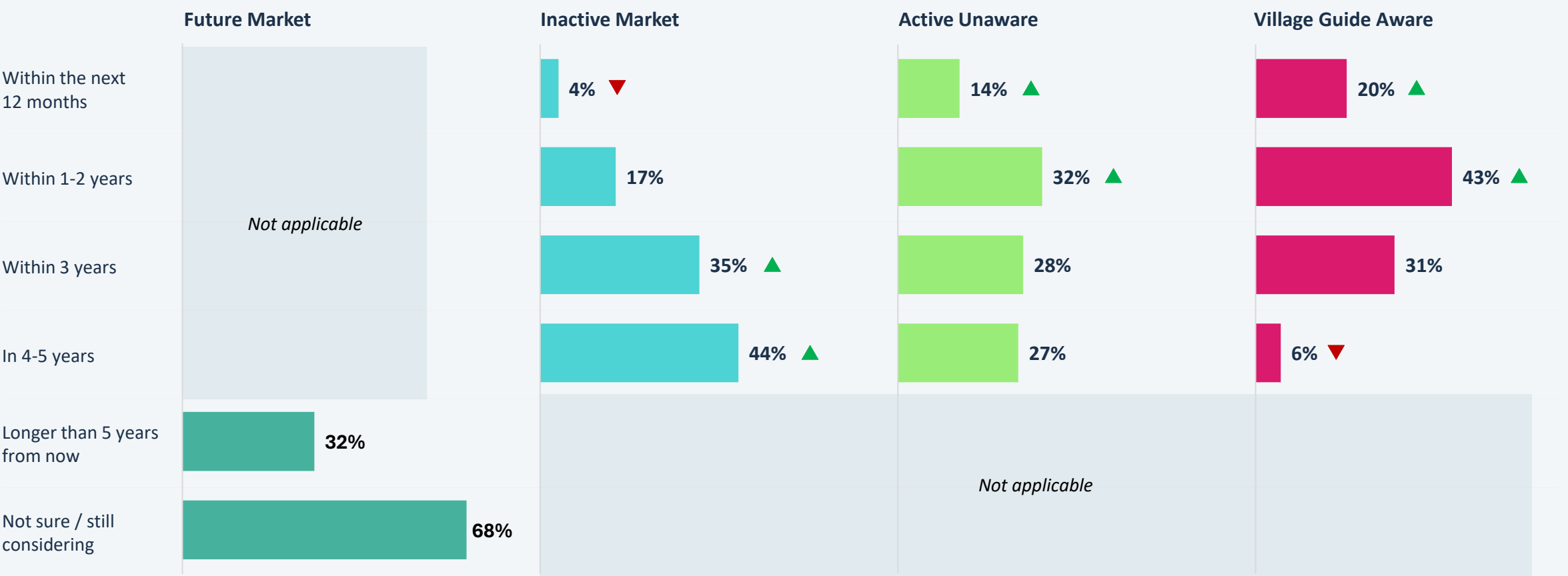
How far along in the process are you while considering moving into a retirement village?

Based on total 65+ year olds in New Zealand (827,607 people)\*

BASE: ADULTS AGED 65+ IN NEW ZEALAND, NATIONALLY REPRESENTATIVE (N=3,182)  
\*SOURCE: STATS NZ

# How soon people are considering a move – by segment

Village Guide awareness increases as prospective residents become closer to moving



BASE: ADULTS 65+ IN NEW ZEALAND, CONSIDERING A RETIREMENT VILLAGE (N=407)  
Q. HOW SOON ARE YOU CONSIDERING MOVING INTO A RETIREMENT VILLAGE?

▲ ▼ Significantly higher / lower than other segments to 95% confidence

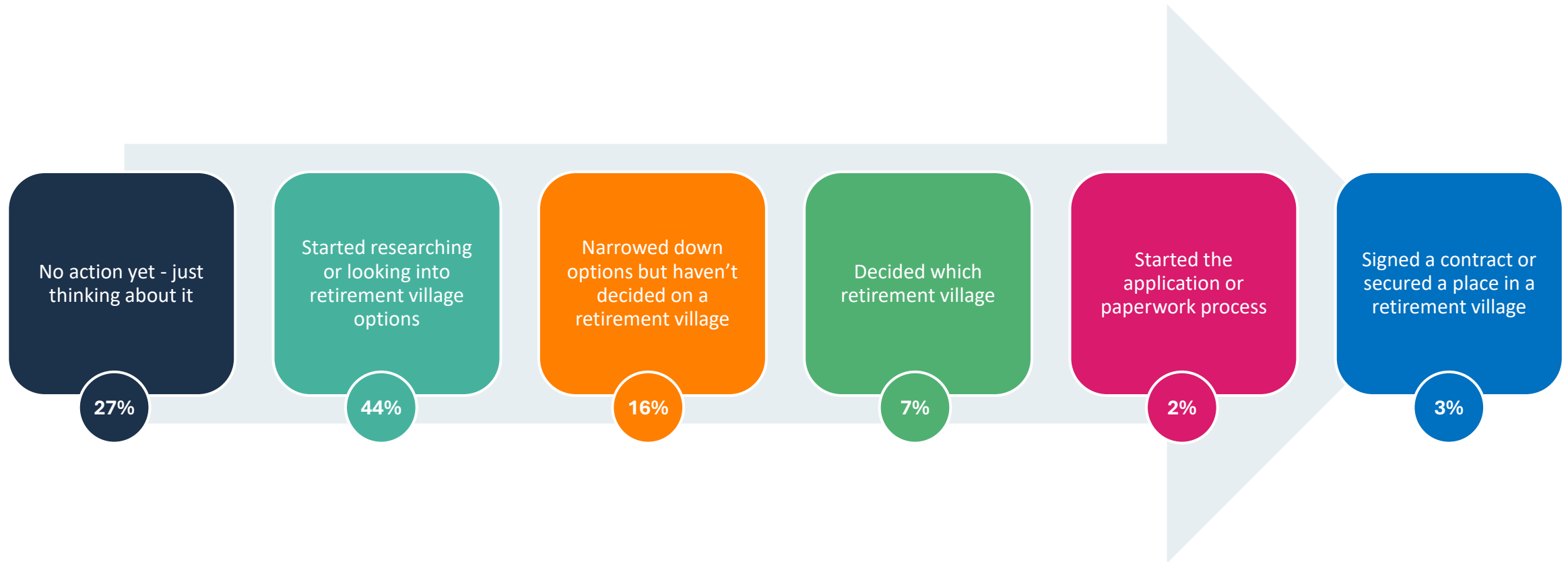


03

# Consumer Journey Overview

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## Current stage of journey (prospective residents)

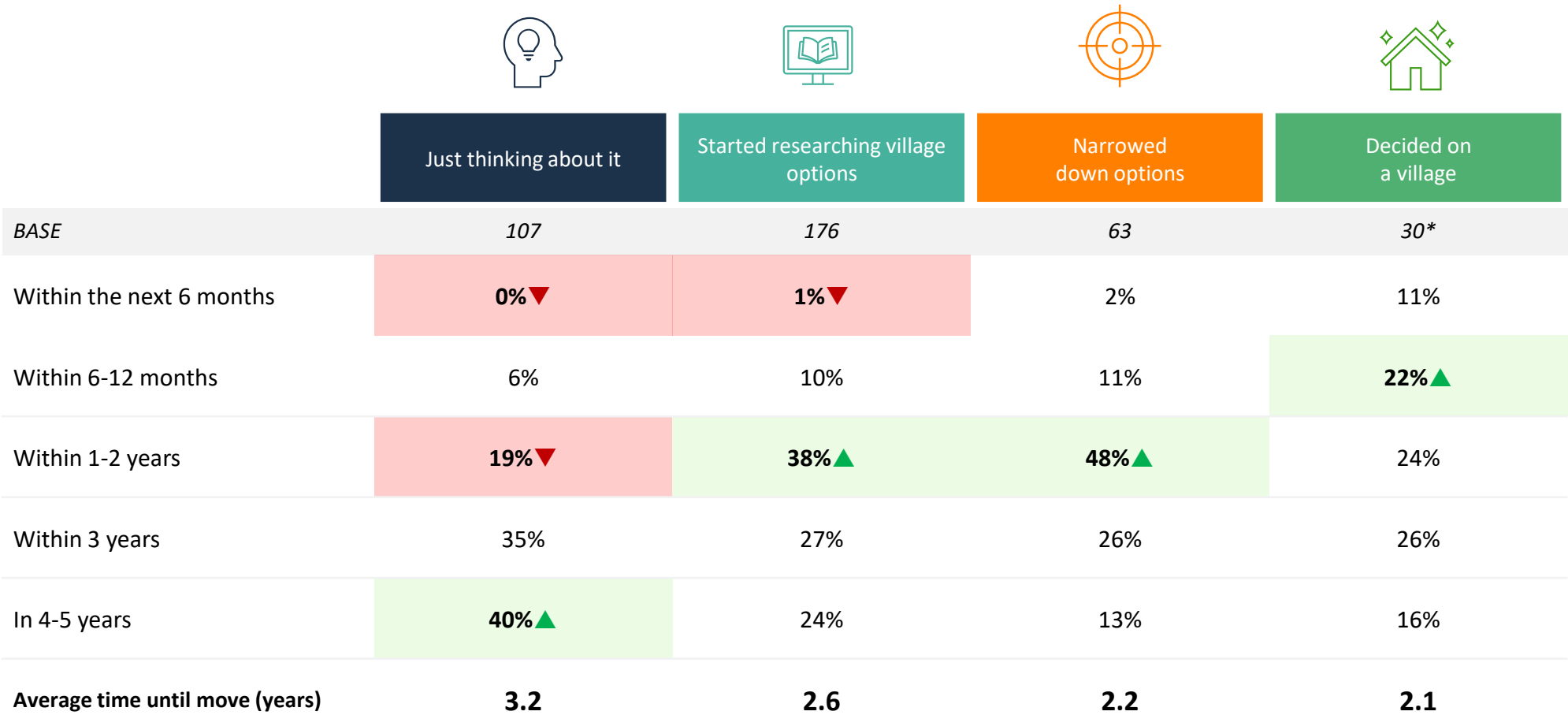


BASE: PROSPECTIVE RESIDENTS AGED 65+ (N=396)

Q. WHICH OF THE BELOW BEST DESCRIBES HOW FAR ALONG IN THE PROCESS YOU ARE WHILE CONSIDERING MOVING INTO A RETIREMENT VILLAGE?

# When considering a retirement village by current stage of journey (Prospective Residents)

The current stage of the journey corresponds with intended time to move, with research on villages increasing within 1-2 years of moving

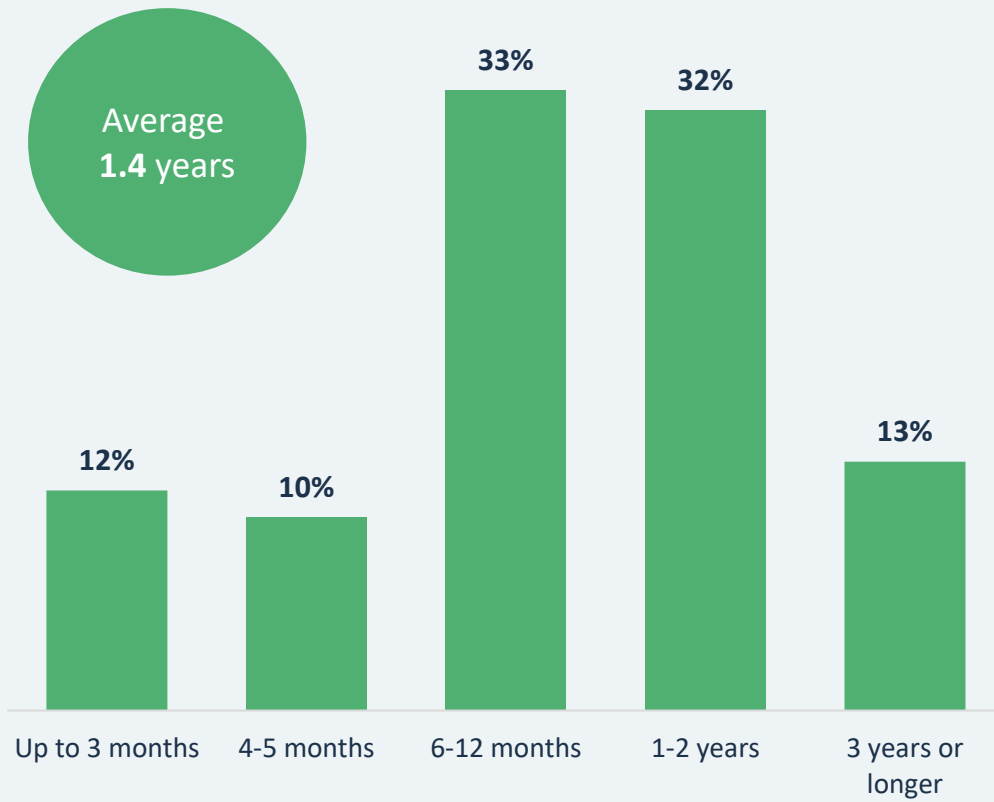


BASE: PROSPECTIVE RESIDENTS AGED 65+ (N=396) \*CAUTION: LOW BASE  
Q. HOW SOON ARE YOU CONSIDERING MOVING INTO A RETIREMENT VILLAGE?

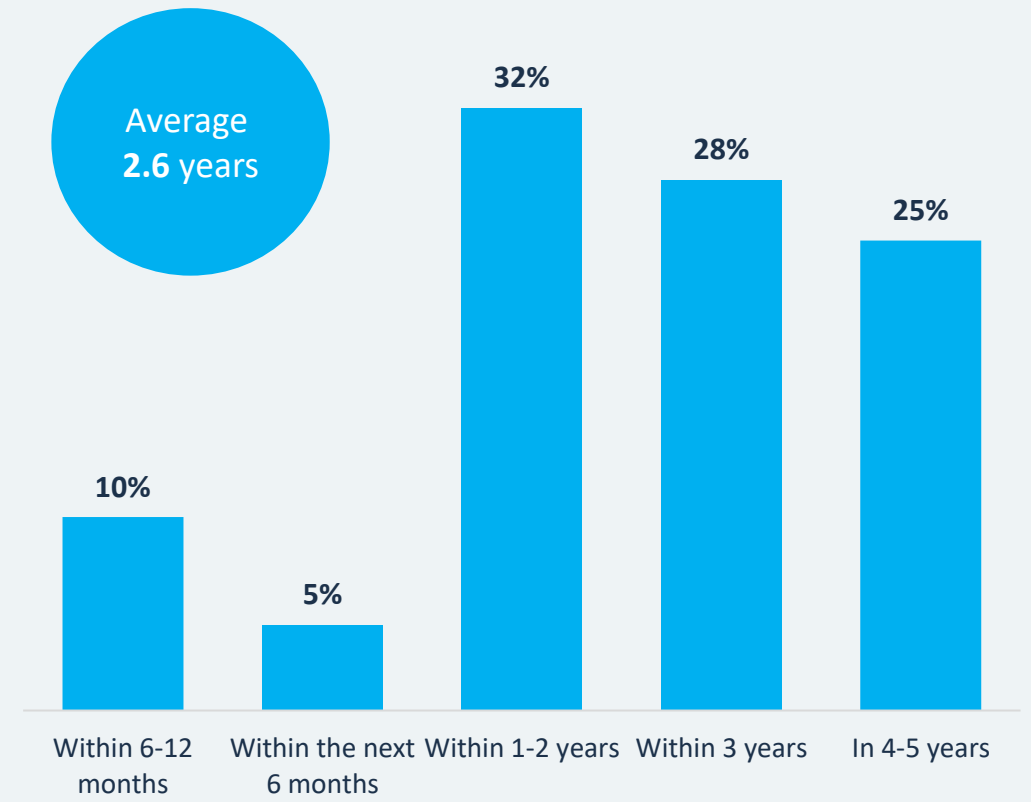
▲ ▼ Significantly higher / lower vs total to 95% confidence

## When prospective residents start thinking about moving - and when they plan to do it

Time already spent considering a retirement village



When considering moving into a retirement village

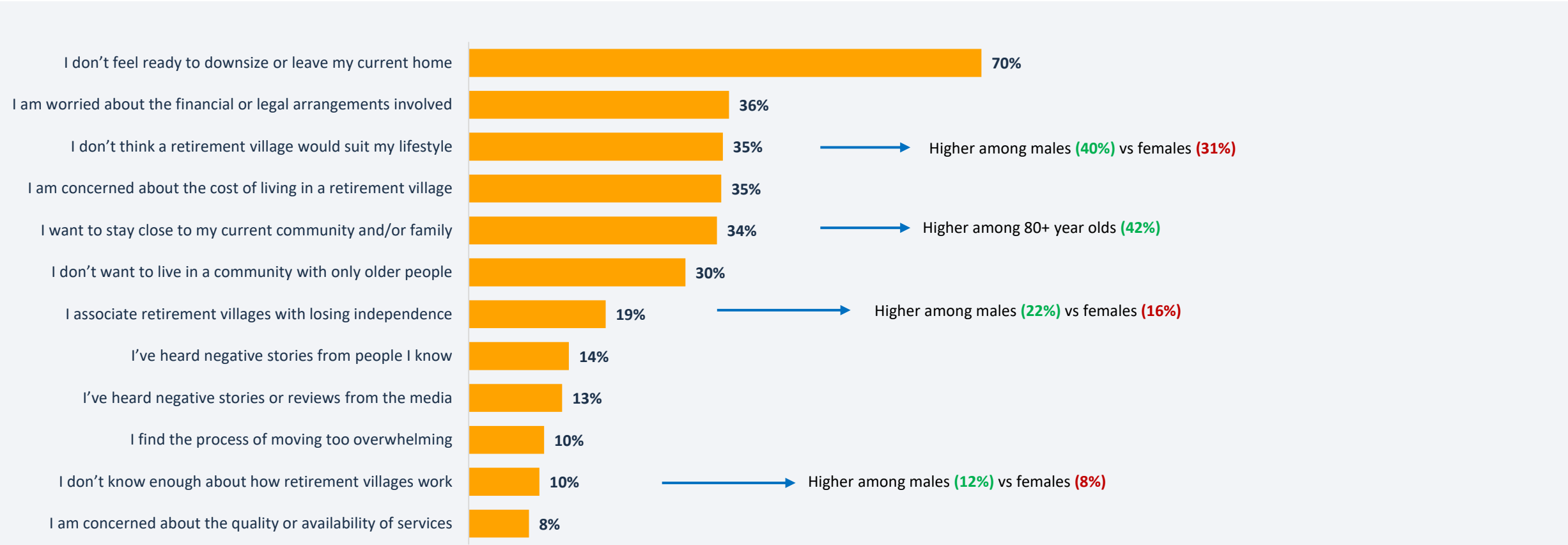


# Barriers among non-consider 65+

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# Barriers to considering a retirement village (among non-considerers aged 65+)

The biggest barrier to consideration is not feeling ready. However, concerns also include financial and legal arrangements, lifestyle, costs, and proximity to family.



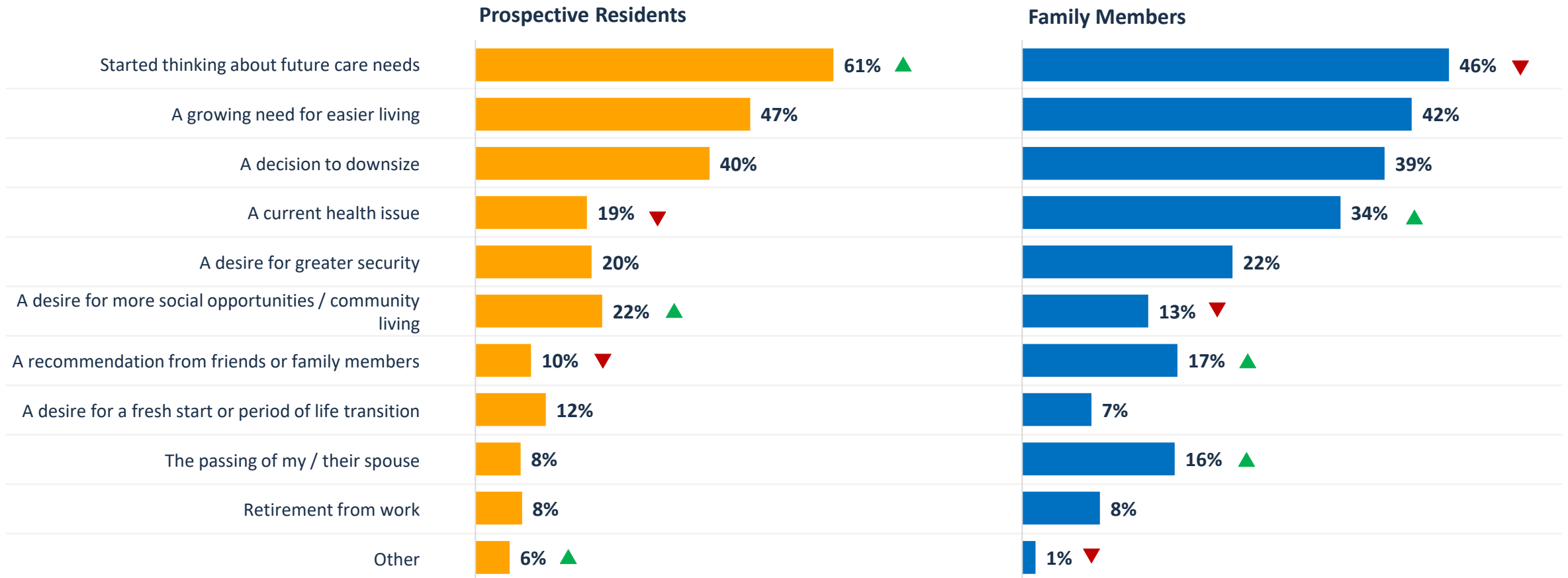
BASE: ADULTS AGED 65+ IN NEW ZEALAND, NON-CONSIDERERS OF RETIREMENT VILLAGES (N=2,378)  
YOU MENTIONED YOU ARE NOT CONSIDERING MOVING INTO A RETIREMENT VILLAGE. WHAT ARE ALL THE REASONS YOU WOULD NOT CONSIDER DOING SO?

# Triggers and barriers among prospective residents

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# Triggers to retirement village consideration

Thinking about future care needs is the top trigger for prospective residents, while family members are more likely to be prompted by health issues or a growing need for easier living.



BASE: PROSPECTIVE RESIDENTS AGED 65+ (N=396), FAMILY MEMBERS (N=185)

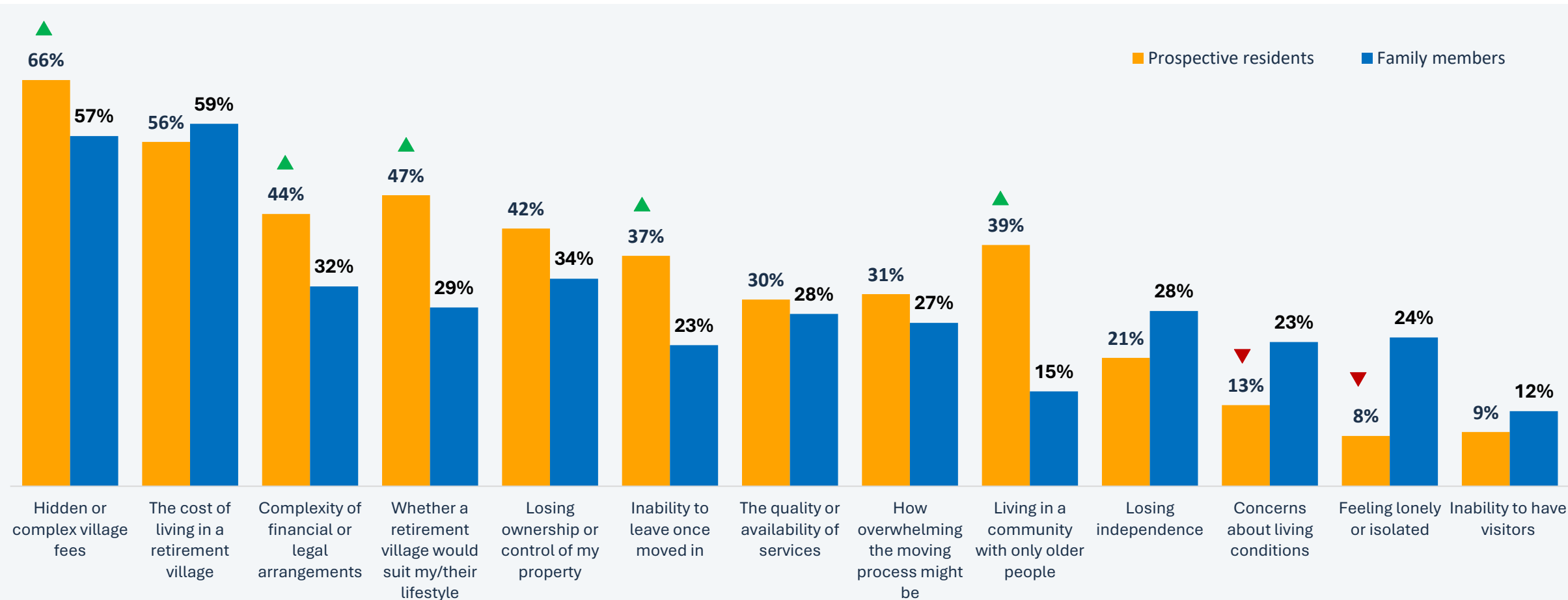
Q. WHAT WAS THE INITIAL TRIGGER FOR YOU / YOUR FAMILY MEMBER/FRIEND TO START THINKING ABOUT MOVING INTO A RETIREMENT VILLAGE?

▲ ▼ Significantly higher / lower than other audience to 95% confidence



# Barriers to retirement villages

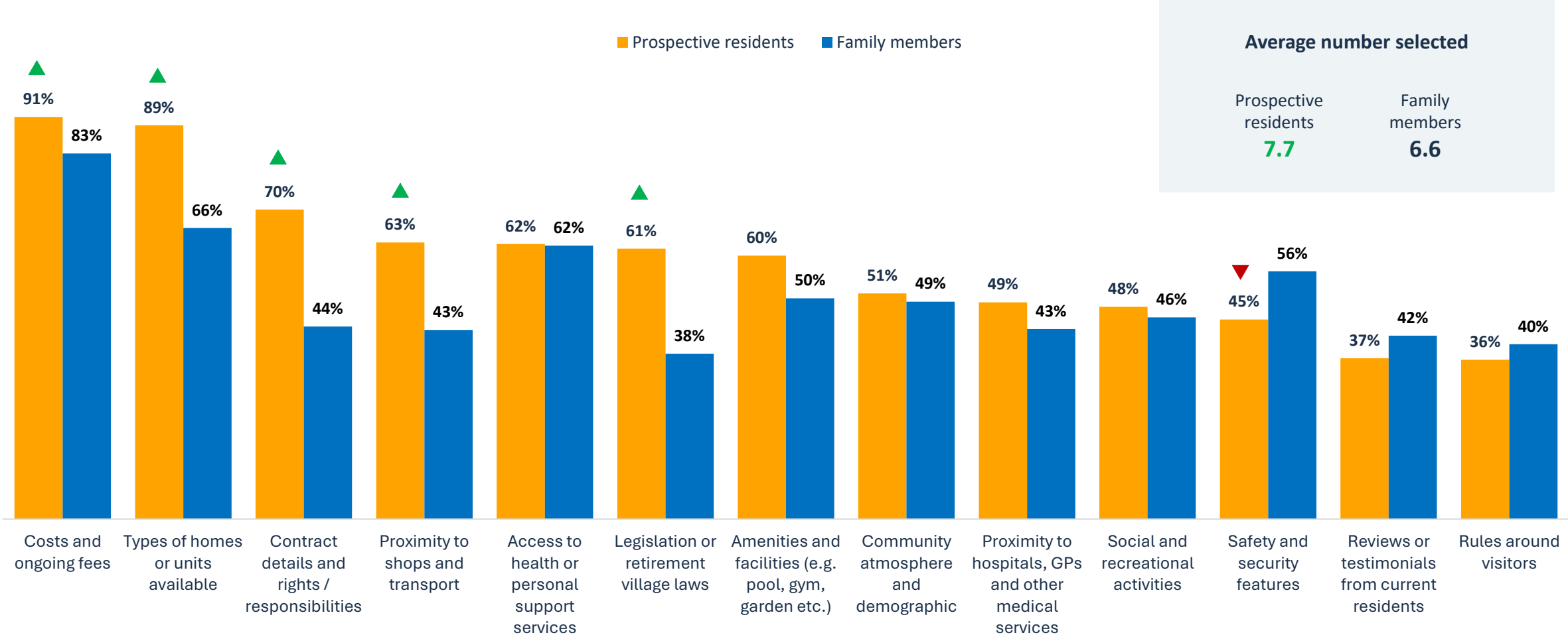
Both prospective village residents and their family members see hidden or complex fees, cost of living, and complicated financial or legal arrangements as the main barriers to entry.



BASE: PROSPECTIVE RESIDENTS AGED 65+ (N=396), FAMILY MEMBERS (N=185)  
Q. WHICH, IF ANY, OF THE FOLLOWING ARE CONCERNS YOU HAVE ABOUT /YOUR FAMILY MEMBER/FRIEND MOVING INTO A RETIREMENT VILLAGE?

▲ ▼ Significantly higher / lower than family members to 95% confidence

# Type of information sought

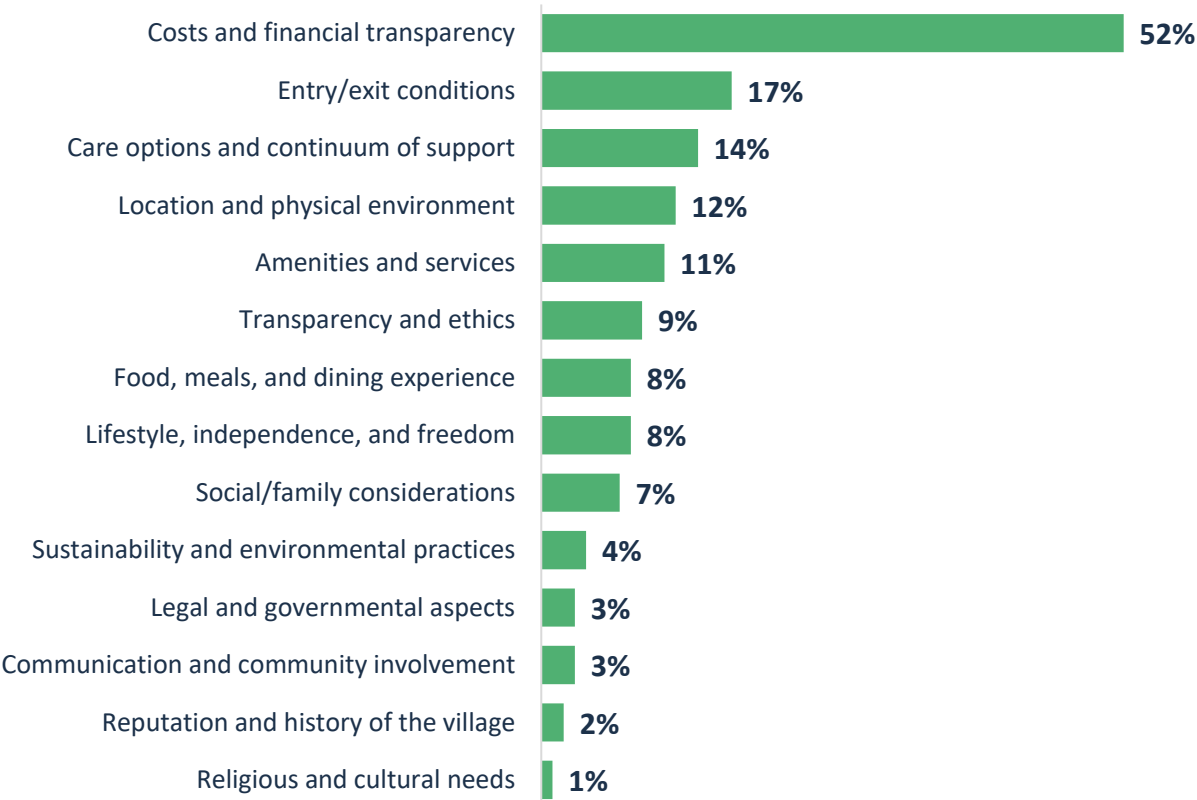


BASE: PROSPECTIVE RESIDENTS AGED 65+ (N=396), FAMILY MEMBERS (N=185)  
Q. WHAT TYPE OF INFORMATION IS MOST IMPORTANT TO YOU WHEN INVESTIGATING DIFFERENT RETIREMENT VILLAGE OPTIONS?

▲ ▼ Significantly higher / lower than family members to 95% confidence

# Information gaps

26% want more types of information

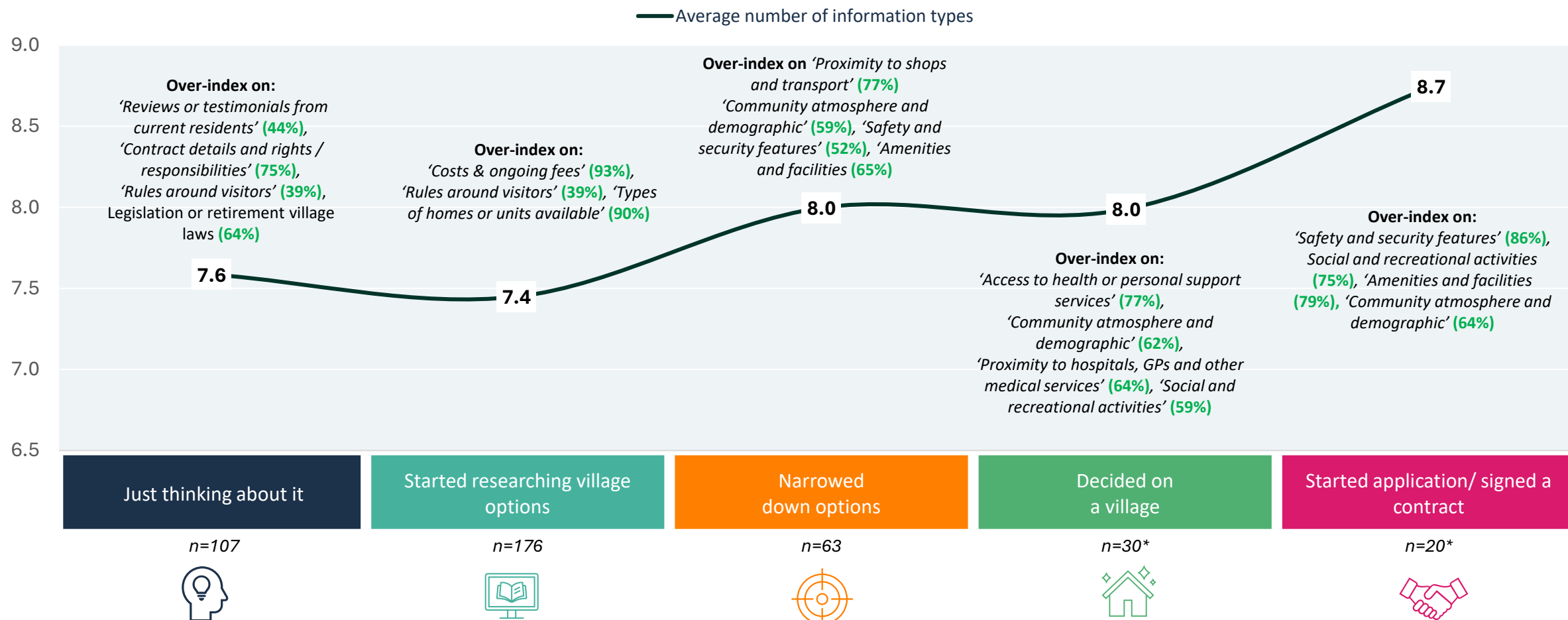


Of those that want more information, over half want further financial information, particularly about entry and exit conditions.

BASE: PROSPECTIVE RESIDENTS AGED 65+ (N=396), FAMILY MEMBERS (N=185)  
Q. IS THERE ANY INFORMATION MISSING THAT YOU WOULD WANT TO KNOW MORE ABOUT REGARDING RETIREMENT VILLAGES?

## Type of information sought: number of information types on average (Prospective residents)

The need for information grows as Prospective Residents get closer to moving into a village, with more lifestyle elements investigated later in the journey



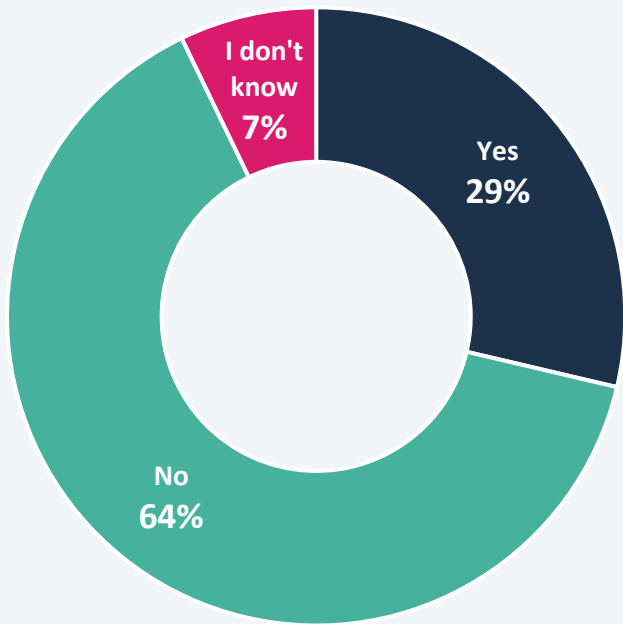
BASE: PROSPECTIVE RESIDENTS AGED 65+ (N=396)

Q. WHAT TYPE OF INFORMATION IS MOST IMPORTANT TO YOU WHEN INVESTIGATING DIFFERENT RETIREMENT VILLAGE OPTIONS?

# Impact of property market on decision (Prospective Residents)

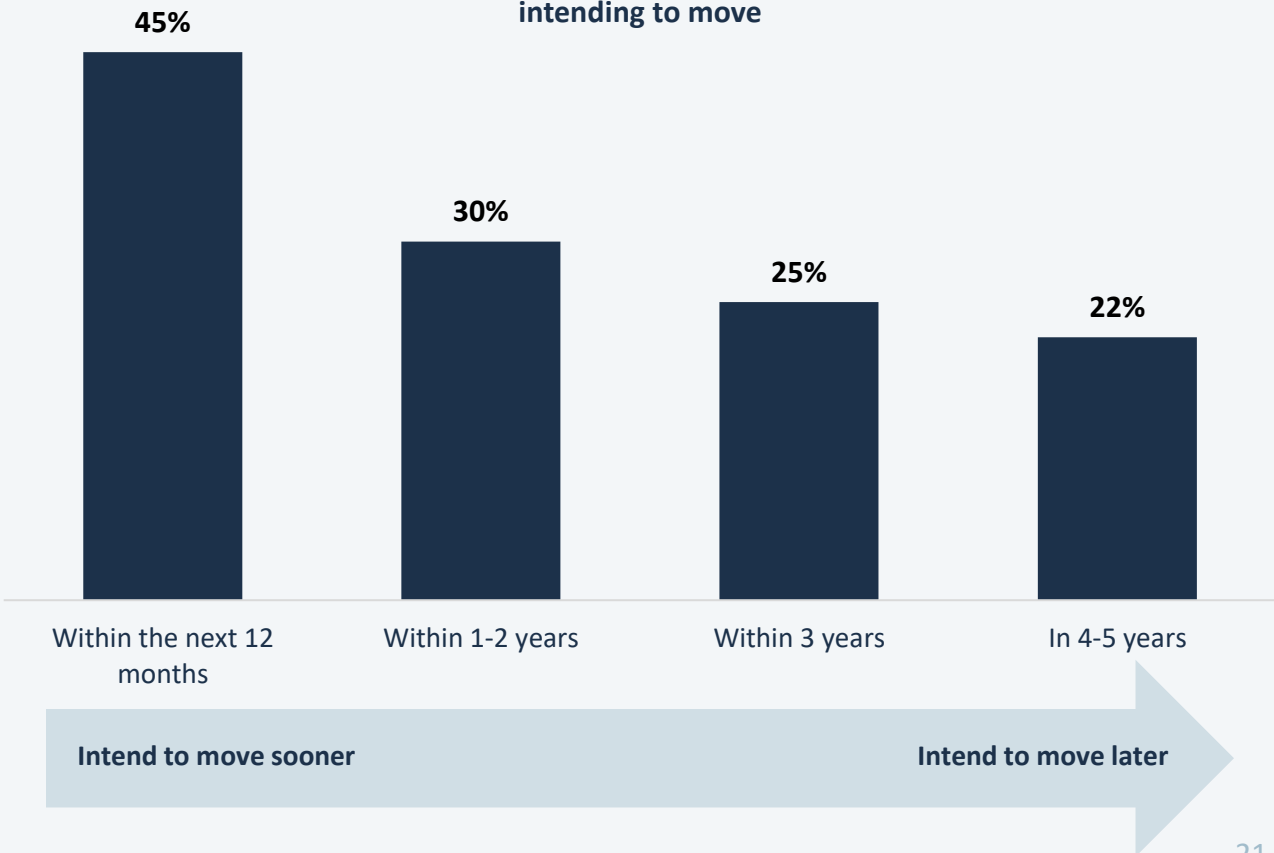
The current property market has delayed the decision to move for 29% of Prospective residents, though this increases for those who are likely to move sooner

Is the property market delaying decision to move into a retirement village (total prospective residents)



■ Yes ■ No ■ I don't know

Impact of property market on decision by when intending to move



BASE: PROSPECTIVE RESIDENTS AGED 65+ (N=396)  
Q. IS THE CURRENT PROPERTY MARKET DELAYING YOUR DECISION TO MOVE INTO A RETIREMENT VILLAGE?

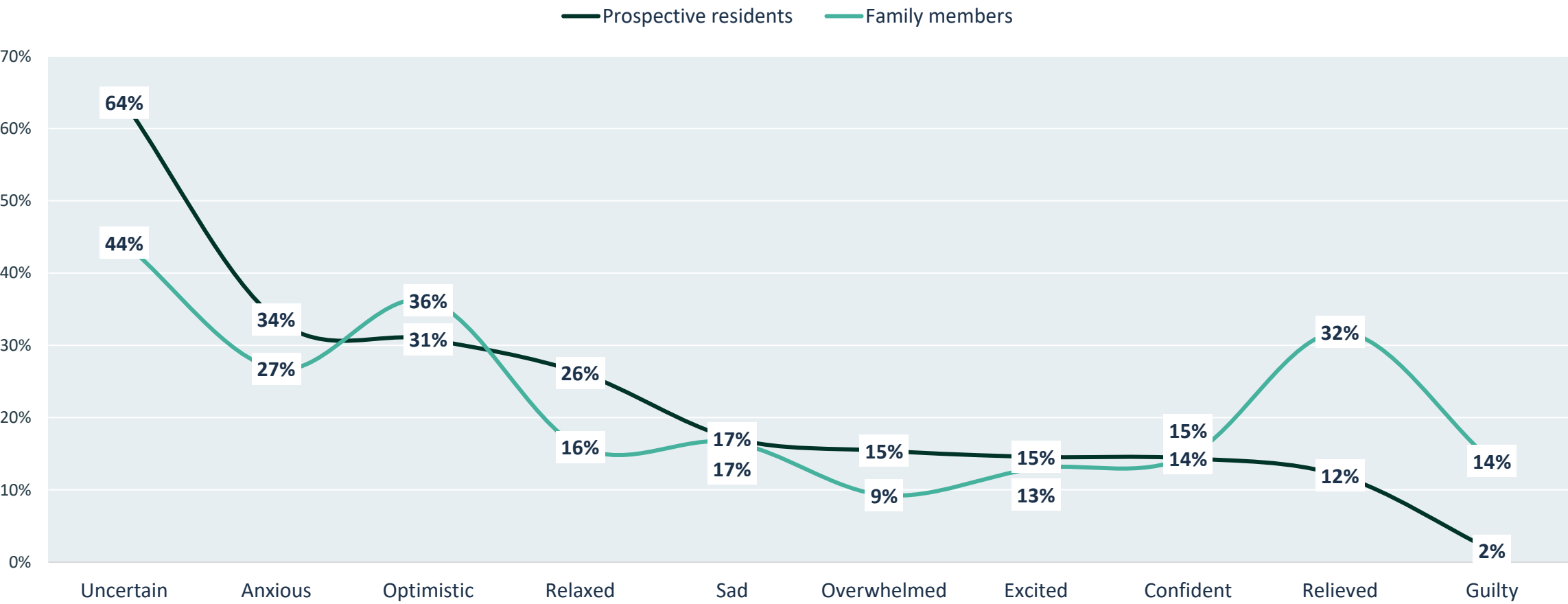
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# Emotions experienced

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# Emotions felt about moving into a retirement village

Uncertainty is the primary emotion for both cohorts, though both relief and guilt are significantly higher among family members

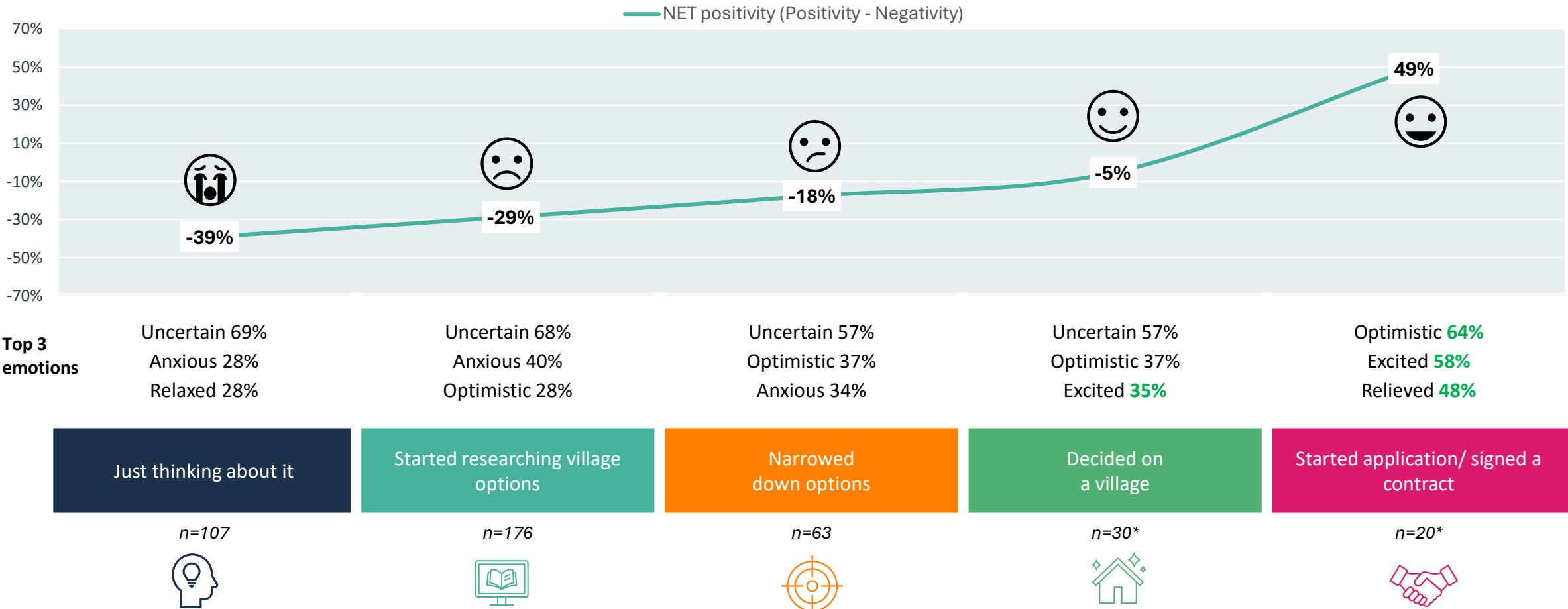


BASE: PROSPECTIVE RESIDENTS AGED 65+ (N=396), FAMILY MEMBERS (N=185)  
Q. WHAT EMOTIONS DESCRIBE HOW YOU FEEL ABOUT THE PROSPECT OF/YOUR FAMILY MEMBER/FRIEND MOVING INTO A RETIREMENT VILLAGE?

▲ ▼ SIGNIFICANTLY HIGHER / LOWER THAN OTHER AUDIENCE TO 95% CONFIDENCE

# Emotions felt by current stage of journey (prospective residents)

Uncertainty remains across most of the journey, though optimism, excitement and relief enter the mindsets of prospective residents as they get closer to moving



BASE: PROSPECTIVE RESIDENTS AGED 65+ (N=396)  
Q. WHAT TYPE OF INFORMATION IS MOST IMPORTANT TO YOU WHEN INVESTIGATING DIFFERENT RETIREMENT VILLAGE OPTIONS?



05

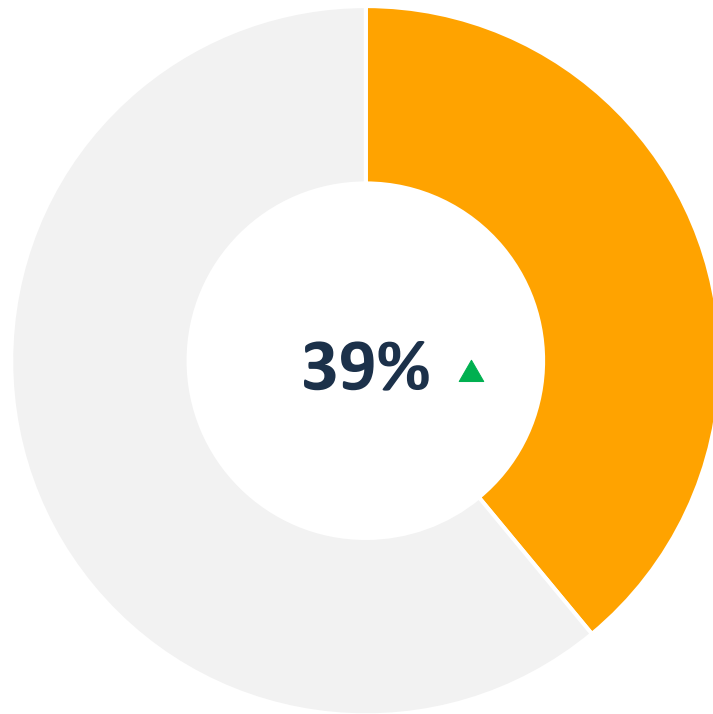
# Operator Brand Perceptions

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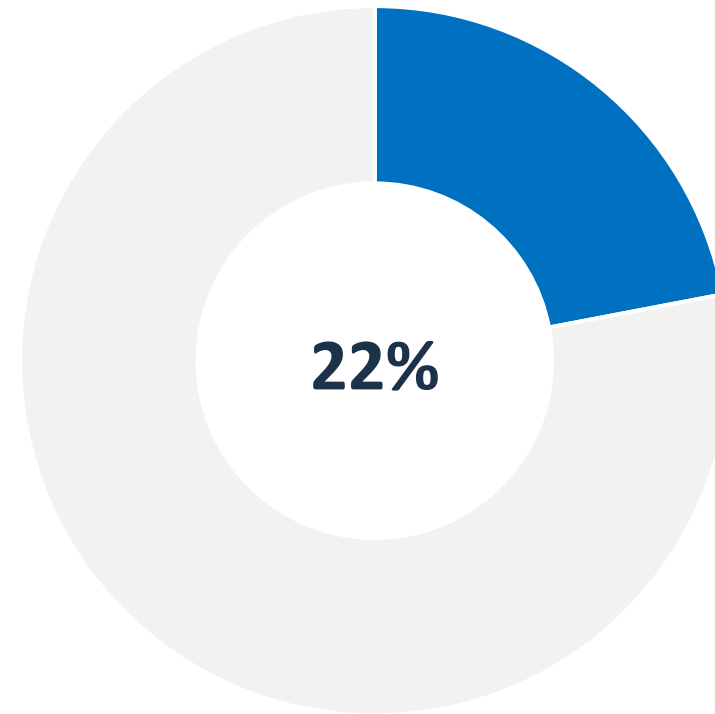
## % who don't have a preferred retirement village operator

2 in 5 residents and 1 in 5 family members do not have a preferred retirement village operator

Prospective Residents



Family Members



## 12 statements shown to respondents underneath 5 pillars



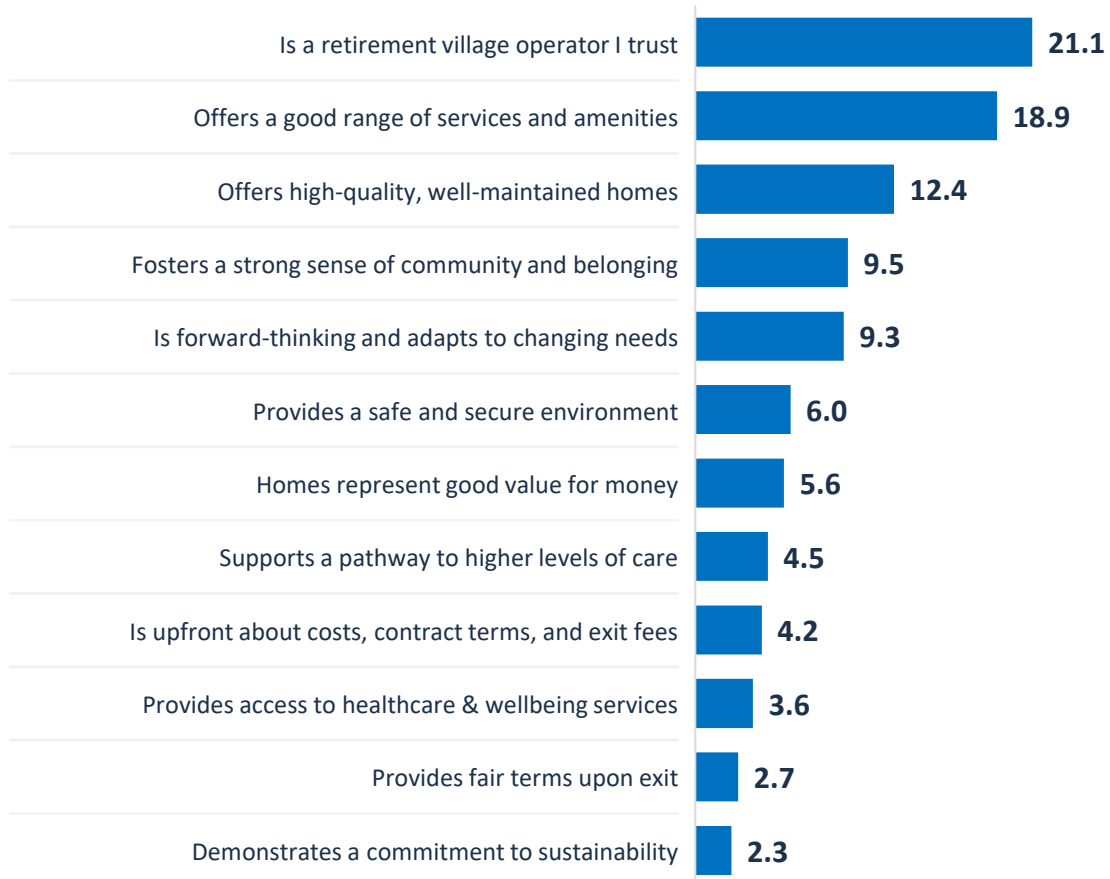
Trust & transparency	Living environment	Quality & value	Care options	Progressive
<ul style="list-style-type: none"><li>• Is a retirement village operator I trust</li><li>• Is upfront about costs, contract terms, and exit fees</li></ul>	<ul style="list-style-type: none"><li>• Provides a safe and secure environment</li><li>• Fosters a strong sense of community and belonging</li><li>• Offers a good range of services and amenities</li></ul>	<ul style="list-style-type: none"><li>• Offers high-quality, well-maintained homes</li><li>• Homes represent good value for money</li><li>• Provides fair terms upon exit</li></ul>	<ul style="list-style-type: none"><li>• Provides residents with access to healthcare and wellbeing services</li><li>• Supports a pathway to higher levels of care</li></ul>	<ul style="list-style-type: none"><li>• Is forward-thinking and adapts to changing needs</li><li>• Demonstrates a commitment to sustainability and environmental responsibility</li></ul>

Drivers analysis is a statistical technique used to identify which factors most influence a specific outcome. In this case, it was used to determine which statements have the strongest impact on either consideration or preference for a retirement village operator.

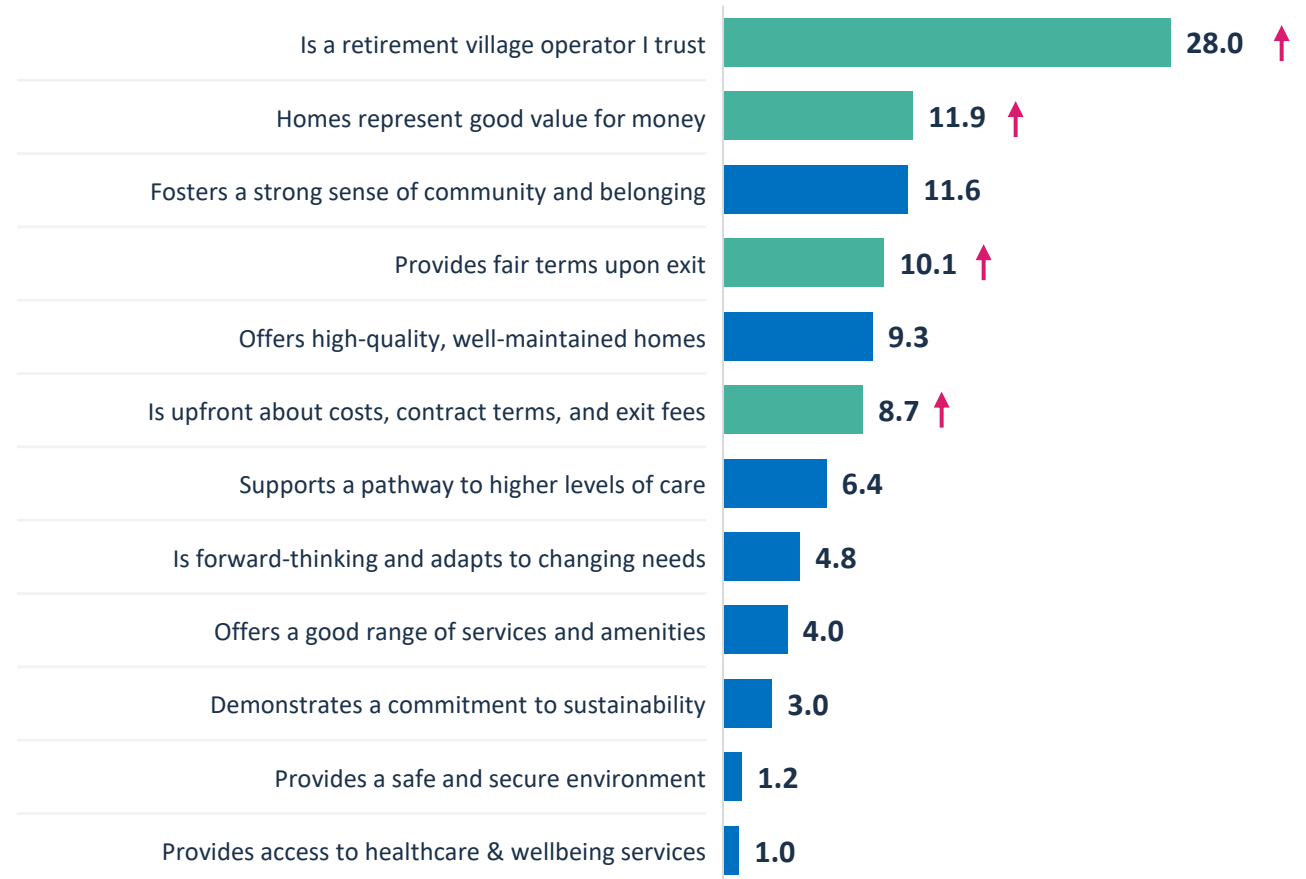
# Drivers of consideration and preference (Prospective residents and family members)

Trust, range of services, and quality of homes are strong consideration drivers, though value for money, exit terms and cost transparency increase as drivers of preference

## Drivers of Consideration



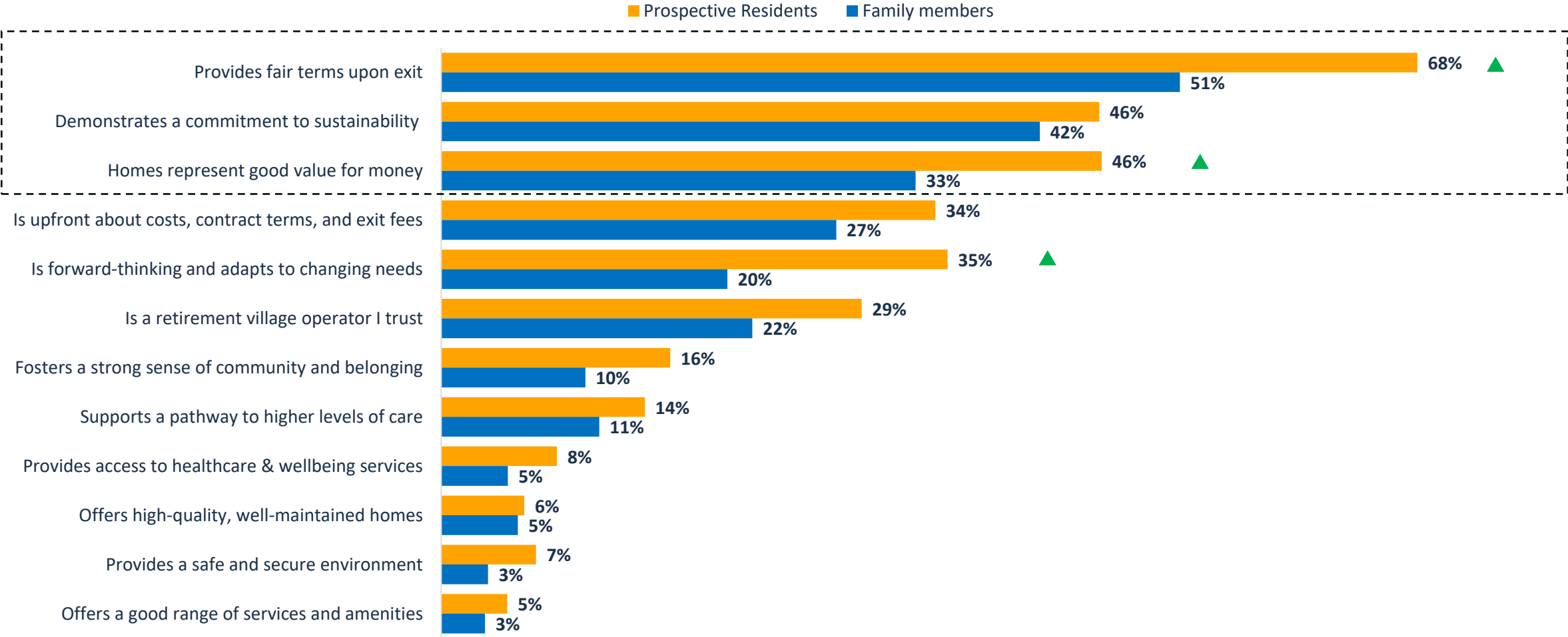
## Drivers of Preference



BASE: PROSPECTIVE RESIDENTS AGED 65+ (N=396), FAMILY MEMBERS (N=185)

NB: DRIVERS ANALYSIS CONDUCTED TO DETERMINE THE STRENGTH OF EACH STATEMENT ON CONSIDERATION AND PREFERENCE OF ANY VILLAGE OPERATOR

# Village operator brand perceptions: % who associate 'None of these' with each statement



BASE: PROSPECTIVE RESIDENTS AGED 65+ (N=396), FAMILY MEMBERS (N=185)  
Q. BELOW IS A RANGE OF STATEMENTS ABOUT DIFFERENT RETIREMENT VILLAGE OPERATORS IN NEW ZEALAND.  
PLEASE SELECT WHICH OPERATORS YOU WOULD ASSOCIATE WITH EACH STATEMENT

▲ ▼ Significantly higher / lower than family members to 95% confidence

06

# Summary & implications

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# Summary

## Decision timeline & research behaviour

- Future care needs, health changes, and lifestyle desires are common triggers
- 70% of those considering a move have already started researching
- The current property market is delaying decisions for 29% - rising to 45% among those intending to move within the next 12 months

## Barriers to entry

- “Not feeling ready” is the top barrier
- Financial complexity, lifestyle fit, and fear of losing independence are key concerns
- Legal uncertainty, hidden fees, and cost of living rank highly for both residents and families
- Perception of overwhelming processes and loss of control also contribute

## Information needs & gaps

- Top needs: cost transparency, contract terms, home types, and access to support
- Family members place higher importance on healthcare access and proximity to medical services
- Many want more clarity on entry/exit conditions and long-term affordability
- Emotional and lifestyle topics like community feel and social life matter more as decision nears

## Operator perception

- Trust and cost transparency are critical for driving both consideration and preference
- Many prospective residents haven't yet formed a preference for any operator