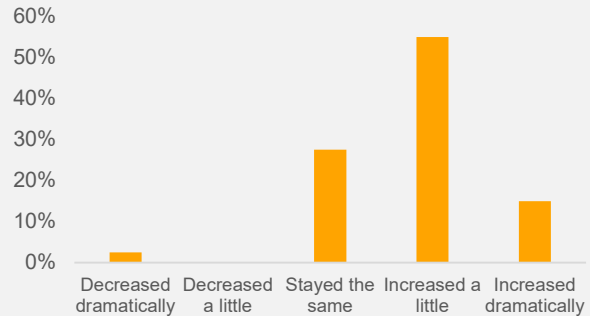
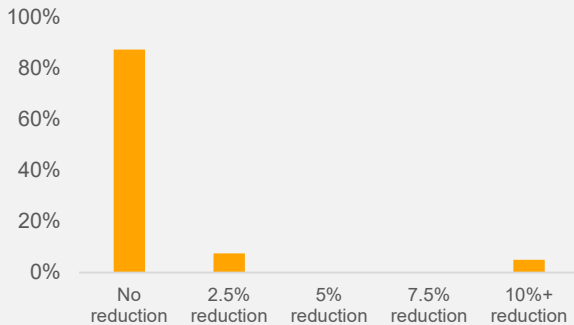


Focus on operators

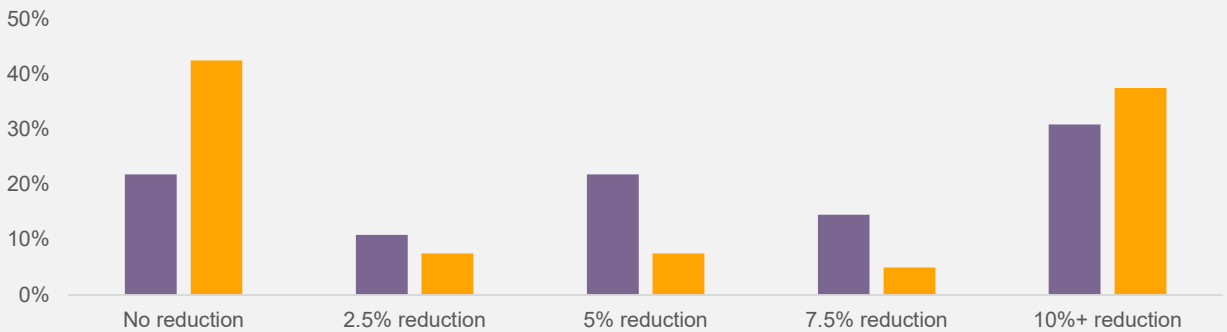
(operator respondents = 40)

How has your occupancy been affected by the COVID-19 outbreak in the last two weeks?

Has there been any effect on supplier costs since the start of the COVID-19 outbreak (e.g. agency staff, food and sundries, medical equipment?)



What impact do you predict COVID-19 will have on occupancy within elderly care homes within the UK over the next three months?



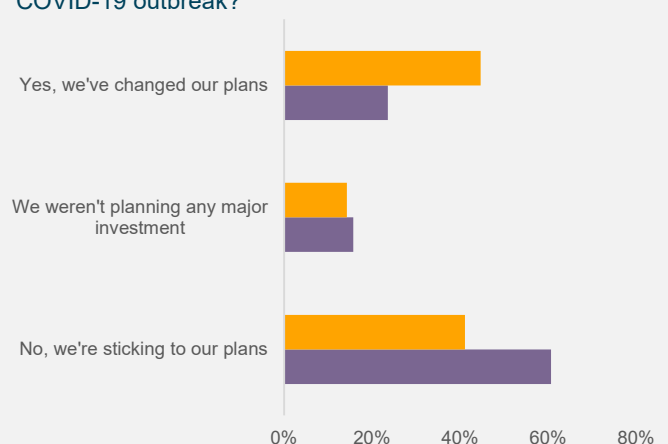
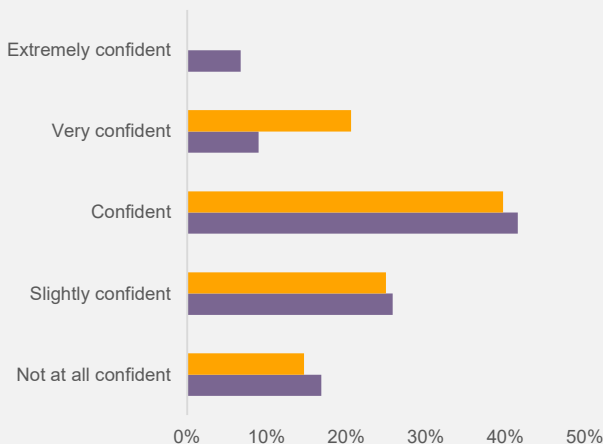
Comparison of responses from: ■ 11-Mar ■ 23-Mar

The sector view*

(number of respondents = 68)

What's your level of confidence in the care market right now?

Have you changed any of your 2020 investment decisions in light of the current economic uncertainty surrounding the COVID-19 outbreak?



Comparison of responses from: ■ 23-Mar ■ 11-Mar