

Impact Report

Supercharge decision-making

January 2026

Certified



Corporation



improve decision making
carterwood®





Our Purpose

Supercharge decision making

Our Values



Do it right



Never stand still



Be brave



Our Purpose

Supercharge decision making

For our clients

We provide critical market insight that underpins capital allocation in Healthcare Real Estate.

By working together closely and developing products collaboratively, we help turn complex information into practical, actionable outcomes.

In our business

We embed clear thinking and informed decision making into how we operate day to day.

Through strong governance, communication, and investment in our people, we create an environment where decisions are transparent and aligned with long-term impact.

Across the sector

We contribute to better decision-making beyond our immediate client base by sharing insight and engaging with the wider market.

Through research and responsible data use, we help shape a more informed and sustainable care sector.



Our Impact Framework



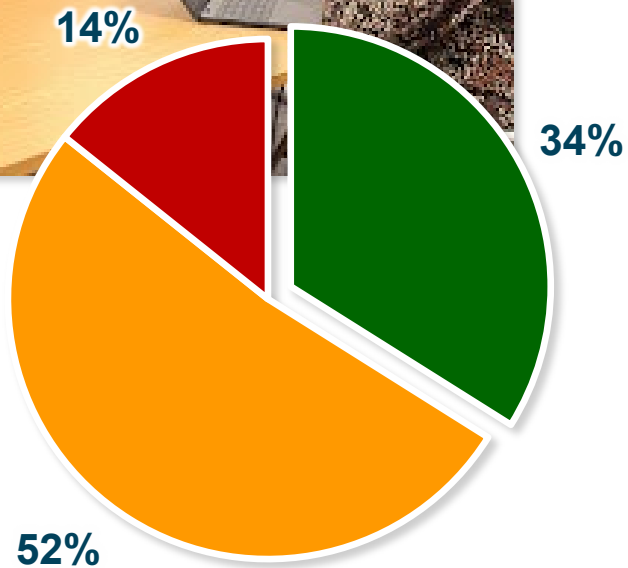
How we deliver impact

EOS and Vivid Vision guide priorities, decisions, and accountability across the business

Our approach

Continuous learning and improvement

Delivering the vision



B Corp accreditation is not a one-and-done process but rather one of continuous improvement. This year, our focus has been on using our existing governance framework to drive progress against our Vivid Vision, rather than introducing new layers of reporting.

In the first year of our three-year plan, 34% of our Vivid Vision priorities have been completed, with a further 52% actively in progress, providing early evidence that the framework is translating ambition into action.

While social and environmental considerations are increasingly part of leadership discussion and decision-making, our weekly scorecard has not yet been materially amended to reflect this. This remains an area of focus as we continue to refine how impact is measured alongside commercial performance.

Our Entrepreneurial Operating System (EOS) continues to underpin this approach, providing the structure, accountability, and regular review cycles that support delivery, learning, and course correction over time.

Empowering the team



Certified Carbon Literate



This year, our focus shifted from broad wellbeing initiatives towards building leadership capability and shared understanding across the business.

We invested in PDP coaching for the senior leadership team, recognising the role leadership plays in setting culture, supporting teams, and embedding long-term change.

Alongside this, we continued to invest in access and development by supporting two apprenticeships, both paid at the National Living Wage. This reflects our commitment to fair entry points, skills development, and progression over time.

We also began strengthening collective understanding of social and environmental impact through Carbon Literacy training.

While the outcomes of this work will take time to fully materialise, it is already helping to inform more confident and consistent decision-making across the business.

Carterwood in the community



Our community impact is primarily sector-led, rooted in sharing knowledge, time, and relationships to support positive change across social care.

We continued our support for Championing Social Care throughout the year, including participation in national initiatives such as Care Home Open Week and fundraising activity through the British Cycle Relay. These activities help raise awareness of the sector and recognise the people who work within it.

Alongside this, members of our leadership team continued to mentor others both within and beyond the sector, contributing time and expertise to support learning and development across the wider community.

We also see responsible data sharing as a core part of our community impact. Through our research we provide the sector with robust insight underpinned by strong data ethics, supporting more informed decision-making across operators, investors, and stakeholders.

The world around us



1,137
trees funded



6
tCO2e avoided

This year, our environmental focus has been on improving how we measure, understand, and manage our impact, rather than introducing standalone initiatives.

We strengthened environmental data capture through our finance systems, improving visibility across areas such as travel, suppliers, and team events. This provides a more robust baseline and supports clearer year-on-year comparison as our approach matures.

Alongside this, we began applying more consistent environmental considerations to operational decisions. This has included testing locally sourced suppliers, increasing vegetarian options at team events, and supporting tree planting as a complementary action alongside wider reduction efforts.

We have also started engaging more systematically with suppliers on environmental credentials, building on learning from key renewals and establishing a clearer framework for future decision-making.

Commitment to Net Zero



In 2025, we established a Net Zero roadmap to guide our long-term environmental ambition. This year has been about setting direction, sequencing priorities, and building the capability needed to move forward with confidence.

We prepared our 2024 carbon footprint and have started engaging more actively with Scope 3 emissions, including participation in collaborative work and deeper engagement with suppliers to better understand their impact. This reflects an understanding that a significant proportion of our environmental footprint sits beyond our direct operations.

We have also invested in knowledge-building through an SLT Net Zero workshop and Carbon Literacy training across the team. This work has focused on building shared understanding and confidence, rather than setting immediate targets, ensuring future decisions are better informed.

Supercharging decision-making



Our impact on customers is delivered indirectly, through the decisions they make using our data, insight, and products. By supporting more informed planning, investment, and operational choices, including through development benefit assessment reports that help clients assess and monitor their own positive impact, we contribute to improved outcomes across the care sector.

This year, we focused on developing products in closer collaboration with clients. Carterwood Analytics Spain has been built, validated, and refined through beta testing across 2025, ensuring the product reflects local market conditions and real-world decision-making.

Client feedback continues to shape product development, helping us improve functionality, relevance, and usability. We have also begun extending this approach into specialist care markets, applying the same data-led, collaborative model to more complex areas of care.

 analytics data insight
carterwood

Say hola to our newest Beta!

**Carterwood
Analytics Spain**

Ready for testing

www.demo.carterwoodanalytics.co.uk

What we learned this year

What worked

Embedding impact within existing structures, rather than creating parallel processes, helped maintain momentum. Using EOS, the Vivid Vision, and collaborative product development ensured progress felt practical and aligned with how we already work.

What took longer than expected

Turning ambition into consistent measurement, particularly around environmental impact and net zero, required more groundwork than anticipated. Building reliable data, shared understanding, and confidence across the business proved to be a necessary first step.

Where trade-offs were made

Capacity and focus meant prioritising foundations over pace. In some areas, we chose to invest time in learning, testing, and capability-building rather than pushing for immediate outcomes, recognising this as essential for sustainable progress.



Looking ahead

The updated B Corp standards provide a clear lens for how we prioritise impact as we move forward. They reinforce the importance of sequencing, helping us focus on building strong foundations before accelerating delivery, particularly as we look ahead to re-accreditation.

Over the coming year, our priorities are intentionally focused. We will be conducting a JEDI review in the first quarter, strengthening how equality, diversity, and inclusion are considered across the business.

We will also continue to improve information sharing and transparency, supercharging our own decision-making and alignment across teams.

Environmental capability-building will remain a key area of focus, as we continue to develop and action our Net Zero roadmap, improve measurement, and build the knowledge needed to support meaningful progress over time.



We'll Never Stand Still

This year marked a shift from achieving B Corp certification to embedding its principles into how we operate day to day. Our focus has been on learning, capability-building, and putting the right foundations in place.

There is much more to do. The B Corp framework continues to challenge us to reflect critically, make informed trade-offs, and focus effort where it will have the greatest impact.

Looking ahead, we remain committed to using data, insight, and collaboration to support positive outcomes for our team, our sector, and the communities we work with, continuing to learn and improve over time.



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