

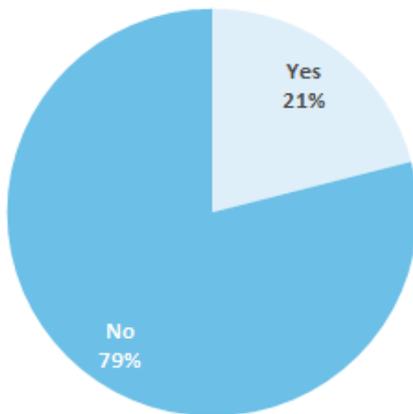
# THE FUTURE OF THE HEALTHCARE MARKET

OPINION POLL RESULTS | OCTOBER 2012

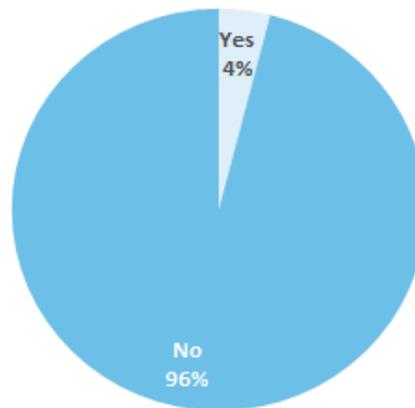
Tuesday 16 October saw the Colliers International Healthcare team launch their latest research to an audience of 160 key influencers in the market, comprising senior figures from both large corporate to small group operators and debt and equity investors.

We took the opportunity to ask these industry experts a series of questions to capture their view on the future of the market and the results are as follows:

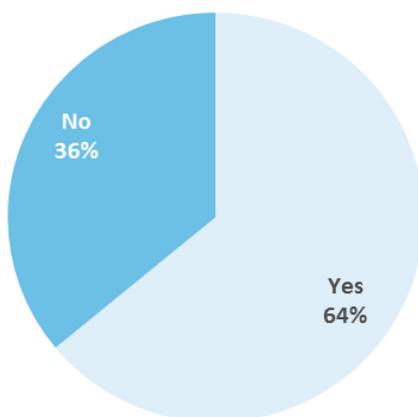
**Are you confident that the next six months will be better than the last six months?**



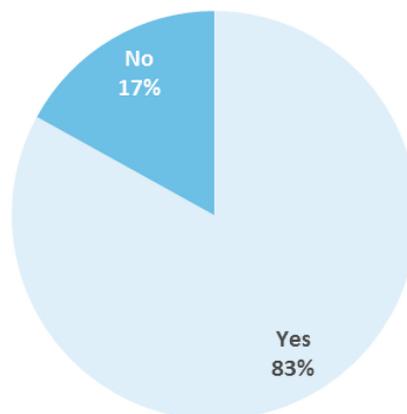
**Will the government make more cash (above inflation) available to fund elderly care over the next three years?**



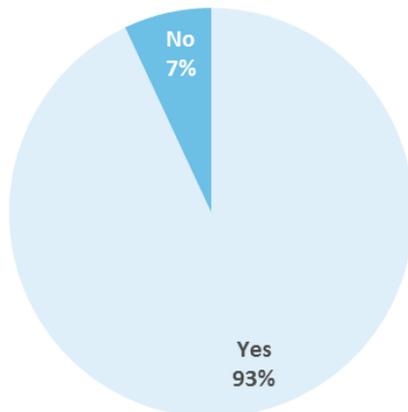
**Will banks lend more to the healthcare sector in 2013 than they will in 2012?**



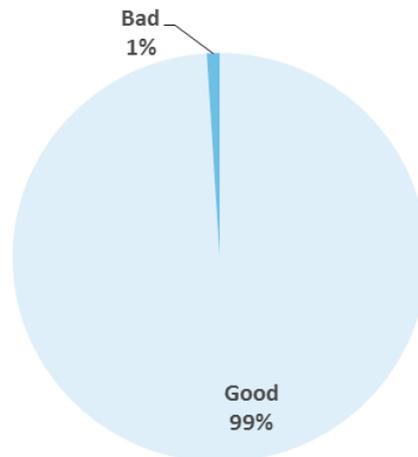
**It is predicted that the number of new care beds in the UK in 2012 will be less than 1% of the current total; given growing demand do we need a higher level of new long term care builds in the UK in 2013 and beyond?**



**Making the assumption that there are quality opportunities and operator covenants out there would you invest your personal savings in the UK healthcare sector?**



**On a personal level do you think that the prospects for the sector are?**



**Jeremy Tasker, Head of Healthcare, concludes that:**

“Confidence that market conditions would improve in the next six months was low and only 4% of the audience thought that the government would fund long term care for the elderly at over the level of inflation. Major positive statements were made concerning increased bank lending to the sector and there was an overwhelming recognition of the market requirement for new home developments. By a massive majority the respondents would invest personally in the sector and 99% thought that prospects for the sector are good.

These responses mirror the Colliers International view that the future for the sector is positive with short term difficulties to be resolved. These difficulties cannot be underestimated and we consider that their solution will define the future shape of the sector where both choice and value for money, coupled with high quality care, will be delivered and sustained in real estate that will comprise much of the current stock but will include innovative new models.”

To discuss these results further, please contact Jeremy Tasker on **020 7487 1991 / 07767 873321** or [jeremy.tasker@colliers.com](mailto:jeremy.tasker@colliers.com).

If you would like a personal invitation to our next research launch in the Spring of 2013 please email Michele Mason at [michele.mason@colliers.com](mailto:michele.mason@colliers.com).