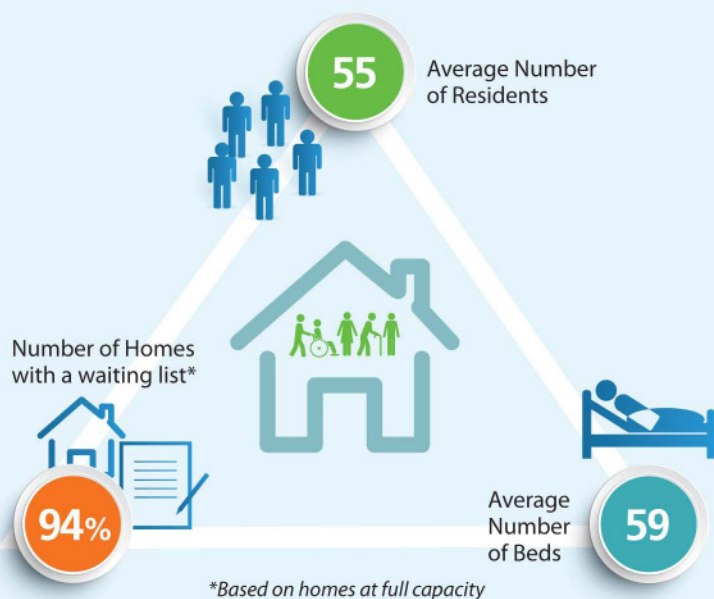
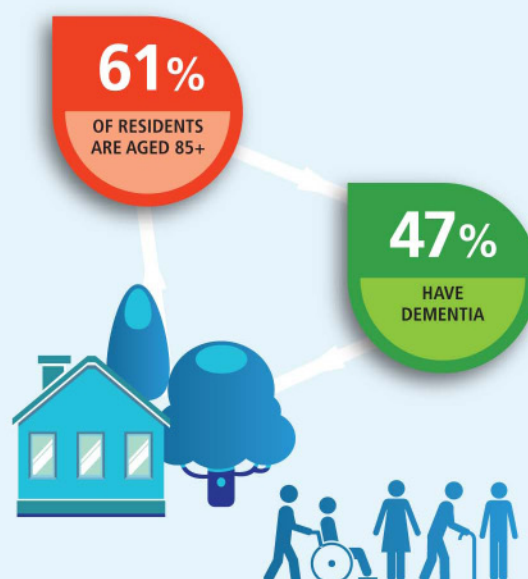


THE LONG-TERM CARE SECTOR

NURSING HOME OVERVIEW



RESIDENT PROFILE

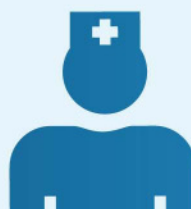


DEALING WITH DEMENTIA



OTHER SERVICES PROVIDED

Palliative Care:	93%	Day Care:	17%
Internal Services:	93%*	Independent Living:	16%
Short-term respite care:	82%	External Care:	4%
Acquired Brain Injury:	45%	Home-care:	2%



(* includes dental, physiotherapy, chiropody hairdressing etc).



THE FAIR DEAL RATE UNDER PRESSURE BUT COSTS INCREASE



Fair Deal Rate Has Decreased/Stayed The Same

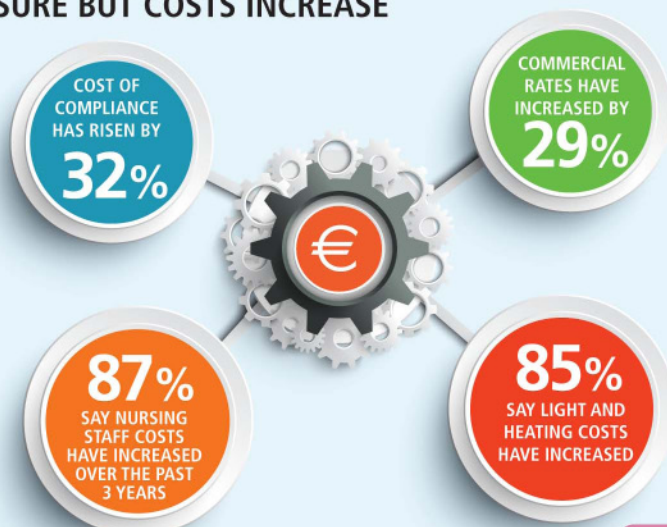
74%

Fair Deal Rate Has Increased

26%

● Fair Deal Rate Accounts for **88%** of Turnover.

● **89%** of Residents are on the Fair Deal Rate.



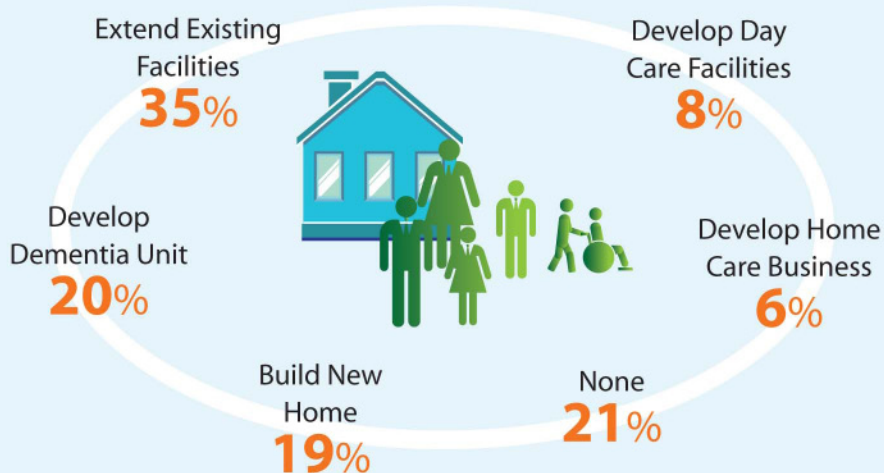
THE LONG-TERM CARE SECTOR



KEY CHALLENGES



THE OPPORTUNITIES

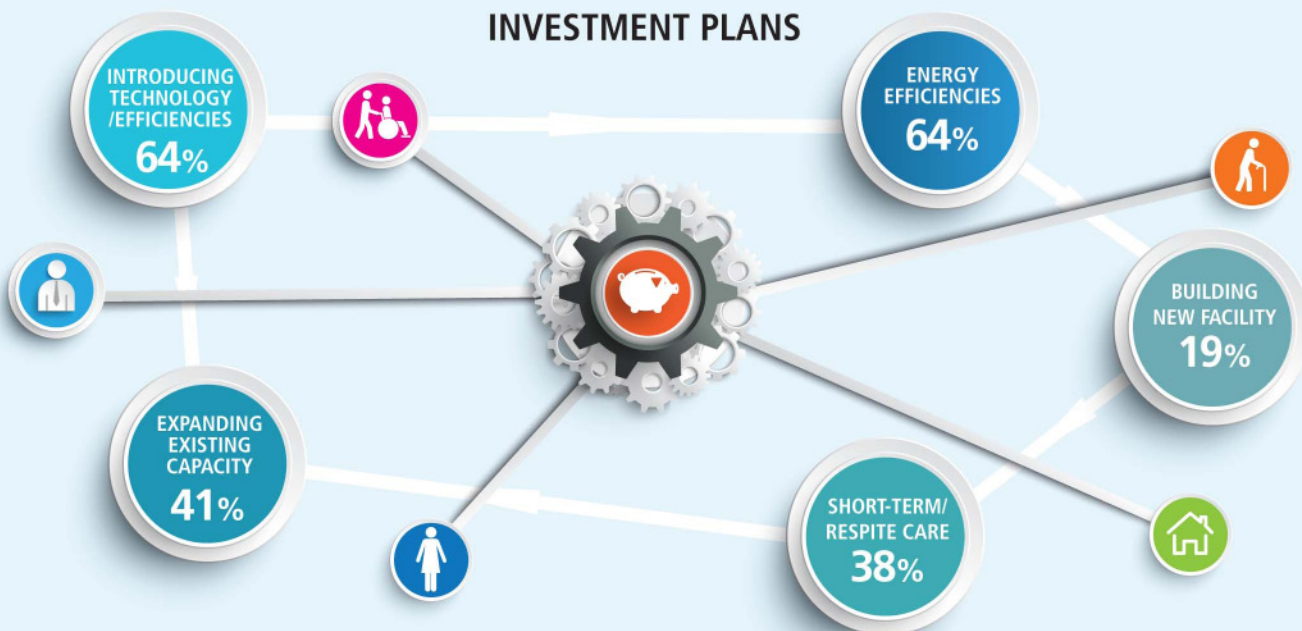


OUTLOOK FOR THEIR BUSINESS WILL BE BETTER IN ...

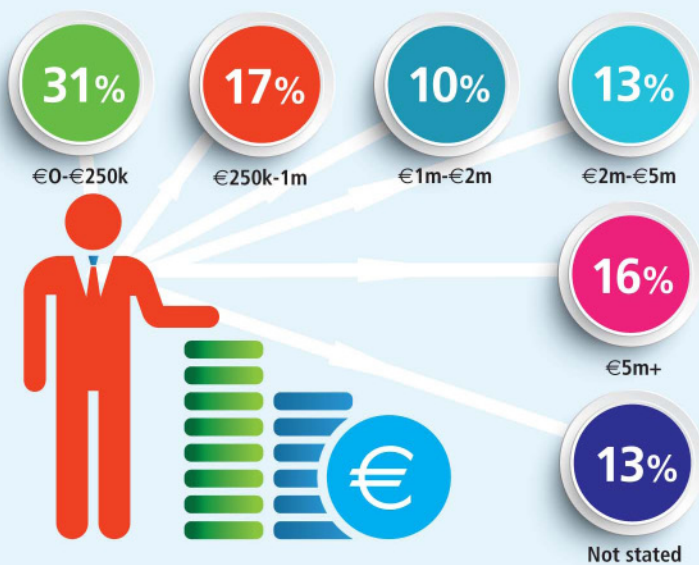


THE LONG-TERM CARE SECTOR

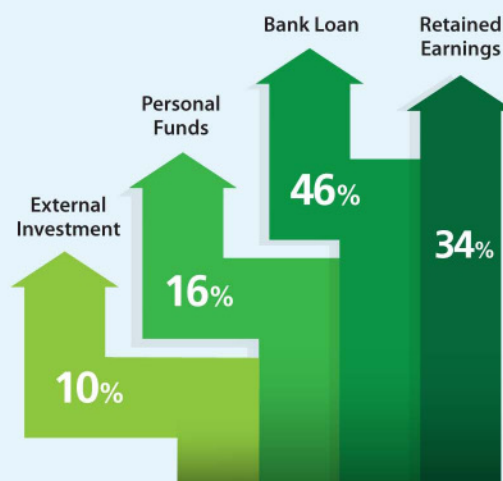
INVESTMENT PLANS



PLANNED INVESTMENT LEVELS



SOURCE OF INVESTMENT



KEY PRIORITIES FOR GOVERNMENT STAKEHOLDERS

