CARE REAL ESTATE

WE MAKE A DIFFERENCE

CUSHMAN & WAKEFIELD

BETWEEN REGULATION, COSTS AND INNOVATION: HOW DO OPERATORS VIEW THE CURRENT CARE REAL ESTATE MARKET?

Survey 2023

> THE DEMAND FOR HIGH-QUALITY CARE FACILITIES IS STEADILY INCREASING DUE TO DEMOGRAPHIC CHANGE – THE CARE SECTOR IS THEREFORE BECOMING EVER MORE IMPORTANT FOR OUR SOCIETY. NEVERTHELESS, SOME OPERATORS HAVE ADAPTED THEIR EXPANSION PLANS TO THE DIFFICULT MARKET CONDITIONS

JAN-BASTIAN KNOD
Head of Residential Investment
Head of Healthcare Advisory

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FOREWORD

Care properties have secured a firm place on investors' radar in recent years - and rightly so: demographic change with an increase in older population groups and single-person households means that the demand for high-quality care facilities is also rising significantly in the long term, as is the importance of the care sector for our society.

The linchpins of this particular market are the operators of the care facilities who, with their highly-specialised know-how, their commitment and their vision, create a differentiated range of services for a wide variety of care needs and continuously adapt this to new and increasingly complex social, structural and regulatory requirements.

These challenges have grown again in the past year: Longer-term developments such as digitalisation and stricter ESG requirements were joined by, among other things, reporting obligations, massively increased energy costs and the new German Tariff Compliance Act, which put a heavy financial burden on many operators. In addition, the flip-side of the demographic change is causing increasing competition for young professionals.

How does the industry itself view current developments? We interviewed around 30 operators of nursing homes, ambulant facilities and assisted living properties in summer 2023 about the trends, challenges and opportunities within this dynamic sector. The answers offer valuable insight into the market situation, future prospects and needs of the various players. Particularly deep insights are provided by the operators lively and aiutanda in interview – who, at the same time, provide an example of the great agility and innovative strength within this sector.

At this point, we would like to express our sincere thanks to all participants whose commitment and openness helped us to gain a sound understanding of the market segment.

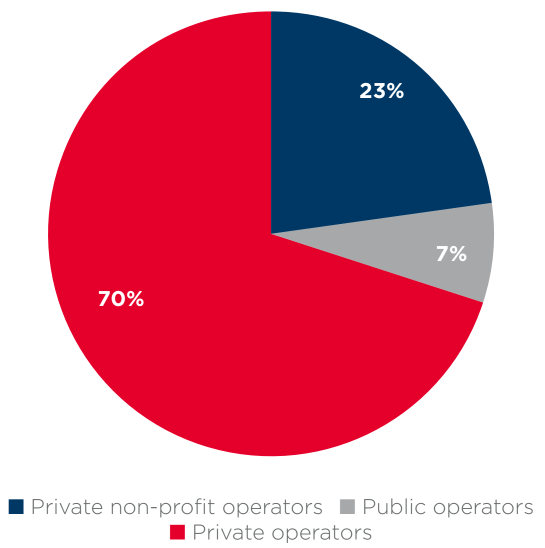
We wish you an exciting read!

Jan-Bastian Knod
Head of Residential Investment
Head of Healthcare Advisory

WHO IS ACTIVE IN THE MARKET?

THE OPERATOR LANDSCAPE IS DIVERSE

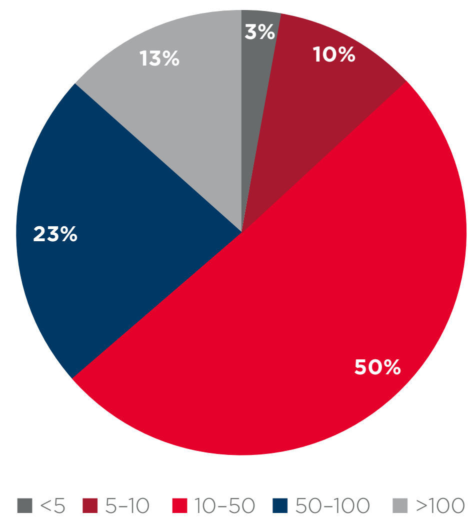
Operator types



Private and non-profit organisations lead the field

In the course of the current operator survey, we interviewed around 30 participants active in the care real estate market in the second quarter of 2023. The majority of the participants, 70 percent, are private operators. Non-profit operators made up around 23 percent of the respondents, while public operators comprised the smallest proportion, at 7 percent.

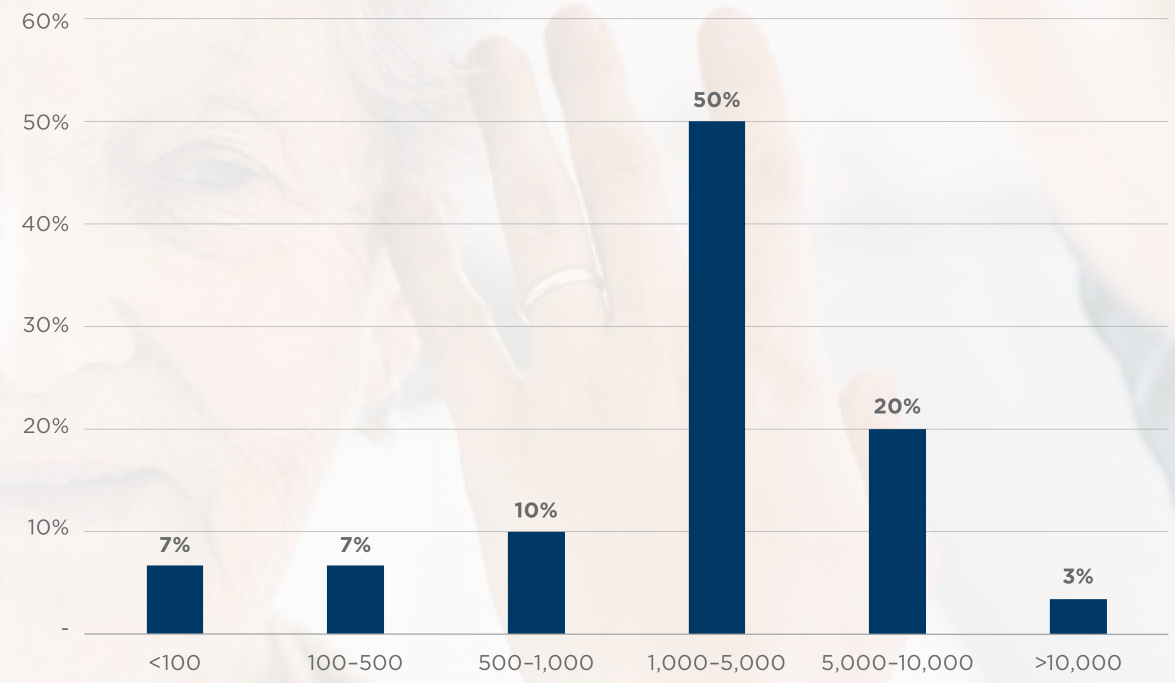
Operator size by number of locations



The majority have a solid network in place

The survey results show a diverse operator landscape – from smaller players with limited reach to large players with extensive presence in many locations. The size also refers to different expansion strategies and business models. Only 3 percent of respondents operate fewer than 5 locations, indicating an early stage of their business or specialisation in certain target groups or regions. Another 10 percent operate 5 to 10 locations, which is a possible sign of early expansion. The majority of companies (50 percent) have between 10 and 50 locations and have thus built up a solid network. 23 percent operate between 50 and 100 locations, indicating expansion and a supra-regional presence. Finally, 13 percent of the companies manage more than 100 locations, which is an impressive size and reach.

Breakdown by number of care places



Broad spectrum of capacities creates an extensive range

The operators were asked how many inpatient and ambulant care places they provide. At 50 percent, the majority provide 1,000 to 5,000 places, followed by an equally significant 20 percent with 5,000 to 10,000 places. Smaller and larger capacities are also represented: 10 percent are responsible for 500 to 1,000 places, and another 10 percent for 100 to 500. A similarly-sized group of 7 percent have less than 100 places. At the opposite extreme 3 percent stated that they provide more than 10,000 care places.

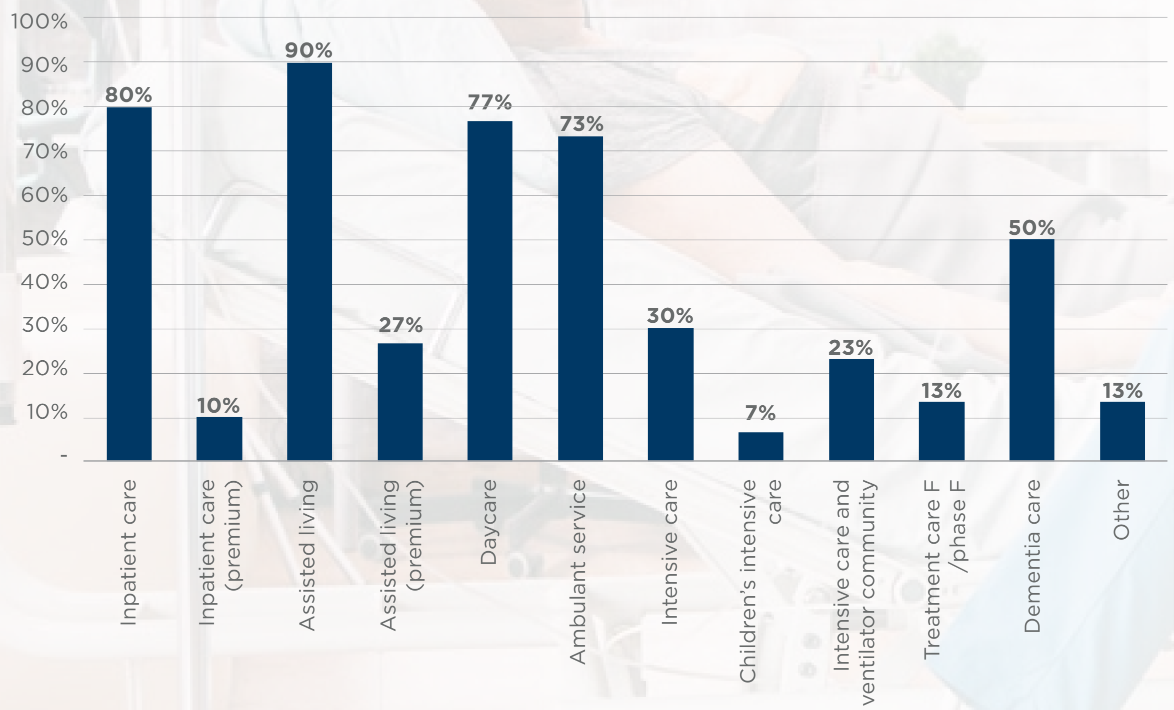
These responses illustrate the diversity of the companies: From small facilities of less than 100 places to multiple large care centres providing more than 10,000 places, they are differentiated and can offer care services for different needs.

HOW IS CARE REAL ESTATE USED?

INPATIENT CARE AND ASSISTED LIVING MOST WIDESPREAD

Operator sectors

Multiple responses possible



In which care sectors are the participants involved?

The care sector serves very different needs and is correspondingly broad in its range of services – from inpatient care to assisted living and ambulant services to highly specialised care for seriously ill patients. This range is also reflected in our survey results.

At 80 percent, the vast majority of the operators are active in inpatient care, with 10 percent in the premium segment. As many as 90 percent are active in assisted living, with 27 percent focusing on the premium segment. Similarly high proportions are accounted for by day care facilities with 77 percent, ambulant services with 73 percent, and dementia care with 50 percent.

While these services predominantly fall into the elderly care segment, various intensive care types are also significantly represented: 30 percent of respondents engage in intensive care, 7 percent focus on intensive care for children. 23 percent also offer intensive care residential communities and respiratory care facilities, and another 13 percent specialise in treatment care for Phase-F patients.

In addition, there are focal points such as individual short-term care, ambulant care residential communities and facilities for people with disabilities.

Location focus of operators

	> 500,000 Inhabitants	250,000–500,000 Inhabitants	100,000–249,999 Inhabitants	50,000–99,999 Inhabitants	< 50,000 Inhabitants
Inpatient care	58%	50%	54%	77%	73%
Assisted living	41%	41%	52%	56%	67%
Day care	41%	23%	59%	64%	77%
Ambulant services	50%	45%	45%	50%	64%
Intensive care	45%	9%	27%	45%	45%

Location distribution varies by type of care

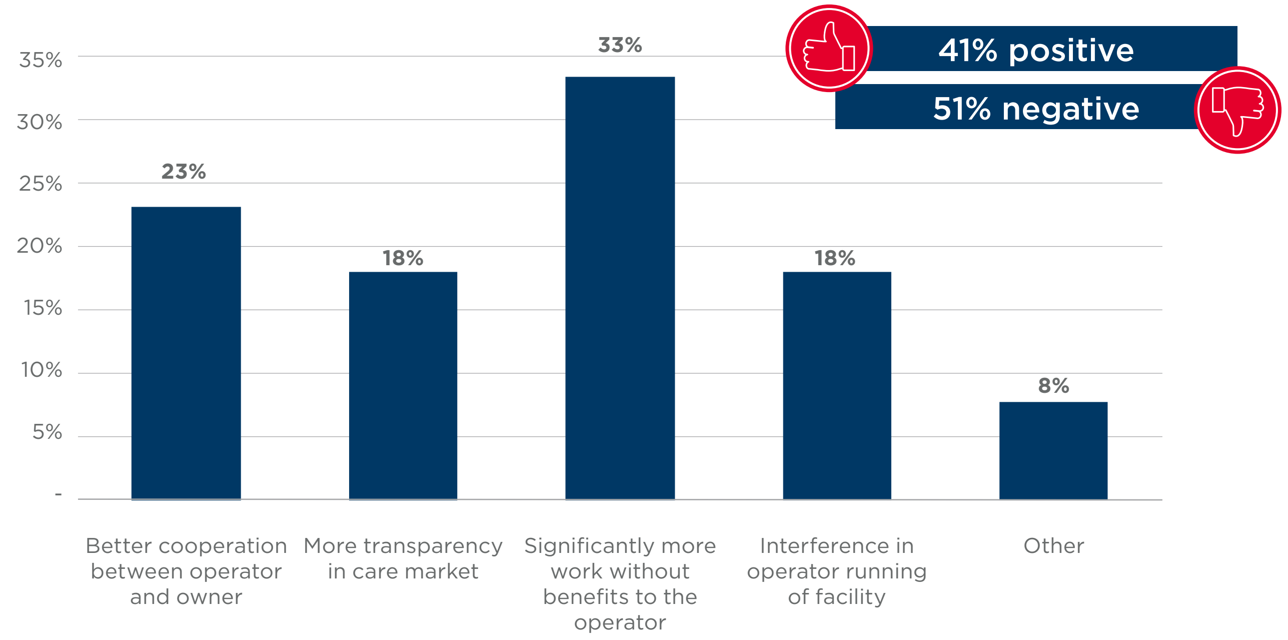
Do operators tend to focus on large cities or smaller locations? The results point to interesting trends regarding the locations where operators in the areas of inpatient care, assisted living, day care, ambulant services and intensive care are particularly active and show that their activities are influenced by the number of inhabitants.

For inpatient care, for example, a largely homogeneous distribution is observed, but with a stronger focus of over 73 percent on locations with populations of less than 50,000 to 99,000. Similar patterns can also be discerned in assisted living, although here there is an even clearer preference for locations with less than 50,000 inhabitants. Day care, on the other hand, shows a tendency towards locations with over 500,000 as well as an even clearer one towards locations with less than 250,000 inhabitants – while the concentration in locations between these figures drops off significantly. The willingness to invest in ambulant services, on the other hand, is distributed more or less evenly across all location sizes, at around 50 percent. Interestingly, intensive care tends to be concentrated in smaller and larger locations, with 45 percent each, while the middle range of 100,000 to 500,000 inhabitants plays a subordinate role.

REPORTING OBLIGATIONS IN FOCUS

USEFUL OR AN ADDITIONAL BURDEN?

Perception of reporting obligations by operators



Effort and benefit are perceived differently

In order to minimise their own economic risks, investors and owners are increasingly demanding extensive reporting obligations from operators via lease or addendum stipulations. How do operators feel about these obligations? Our survey results show a differentiated picture.

For example, 41 percent of respondents consider that the reporting requirements lead to improved cooperation between operators and owners: 23 percent consider that an open exchange of information promotes a strengthened relationship of trust and more effective communication. Another 18 percent believe that the reporting requirements create more transparency in the cooperation. They expect that the disclosure of information on utilisation, key business figures, the proportion of social welfare recipients and self-payers as well as the amount of investment costs will lead to a better understanding of, and clearer insight into, the operation.

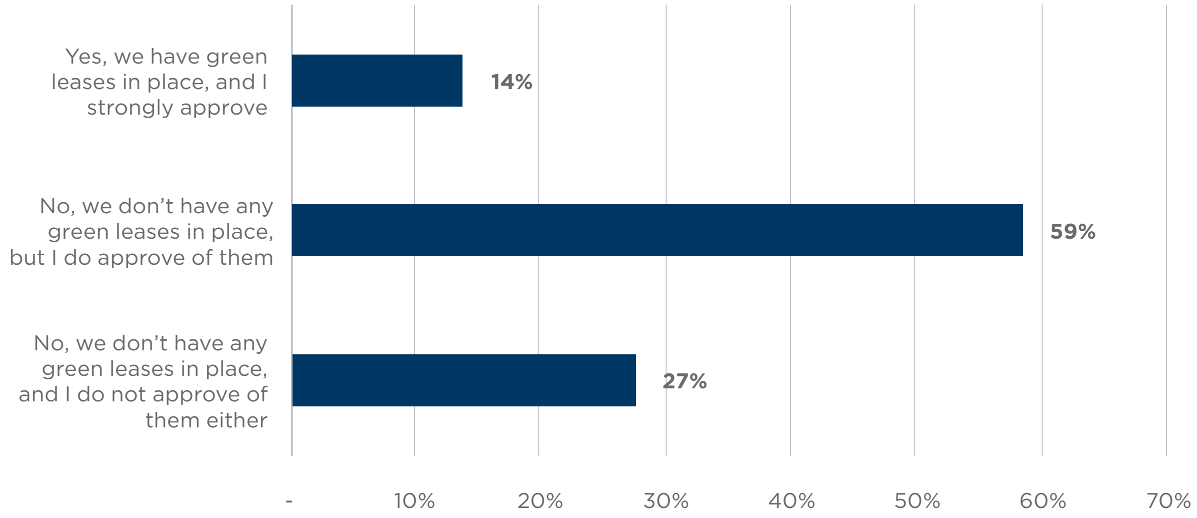
A narrow majority of 51 percent takes a critical view of such obligations: 33 percent of those surveyed believe that the new reporting obligations will mean considerably more work – without bringing any noticeable benefit. They see the additional burden as detrimental, as they do not see any clear added value for their business. 18 percent even consider the reporting requirements to be an intrusion into their operations: Here, there are concerns about the owner's interference in the operational management, which would impair the operator's freedom of decision and autonomy.

While the respondents' answers cannot paint a representative picture of the mood of the entire industry, they do provide an insight into the operators' various perspectives and opinions regarding the owners.

SUSTAINABILITY IN OPERATIONAL PRACTICE

HOW DO OPERATORS REGARD GREEN LEASES?

Operators' contractual sustainability objectives



Majority are not contractually bound but support sustainability targets

"Green leases" - contractually stipulate sustainability goals and are intended to encourage tenants to use a property in a more sustainable way and landlords to manage and fit-out a property in a more sustainable way.

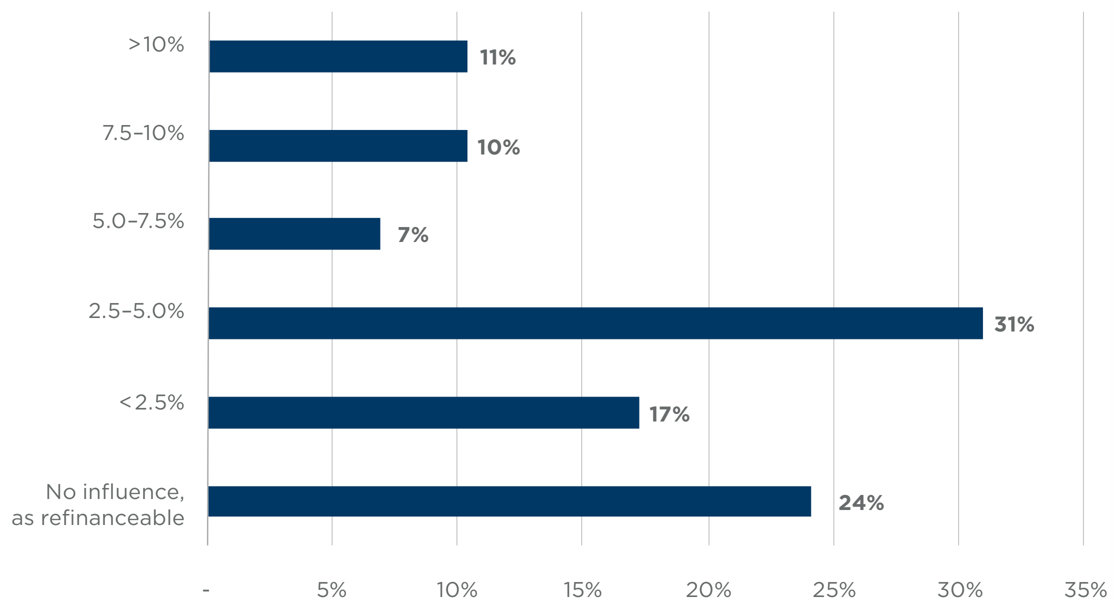
The results show that the majority have not yet concluded green leases, but that there is openness towards doing so. Thus, 14 percent state that green leases already exist in their companies and that this development is perceived as positive. They see it as an effective way to reduce environmental impact and promote sustainable business practices. In contrast, there were no cases where green leases were concluded but perceived as negative. 59 percent report not having green leases, but are in favour of the idea. This group shows a fundamental interest in integrating sustainability goals into their business practices, even if no concrete steps have been implemented so far.

In contrast, 27 percent of respondents report that no green leases have yet been concluded in their companies and neither are they in favour of them. This does not necessarily denote a lack of interest in sustainability goals per se, but may also indicate concerns about the binding nature and consequences of such leases.

STRESS TEST ENERGY COSTS

HIGHER PRICES WEIGH ON OPERATING PROFIT

Decline in operating profit due to higher energy costs



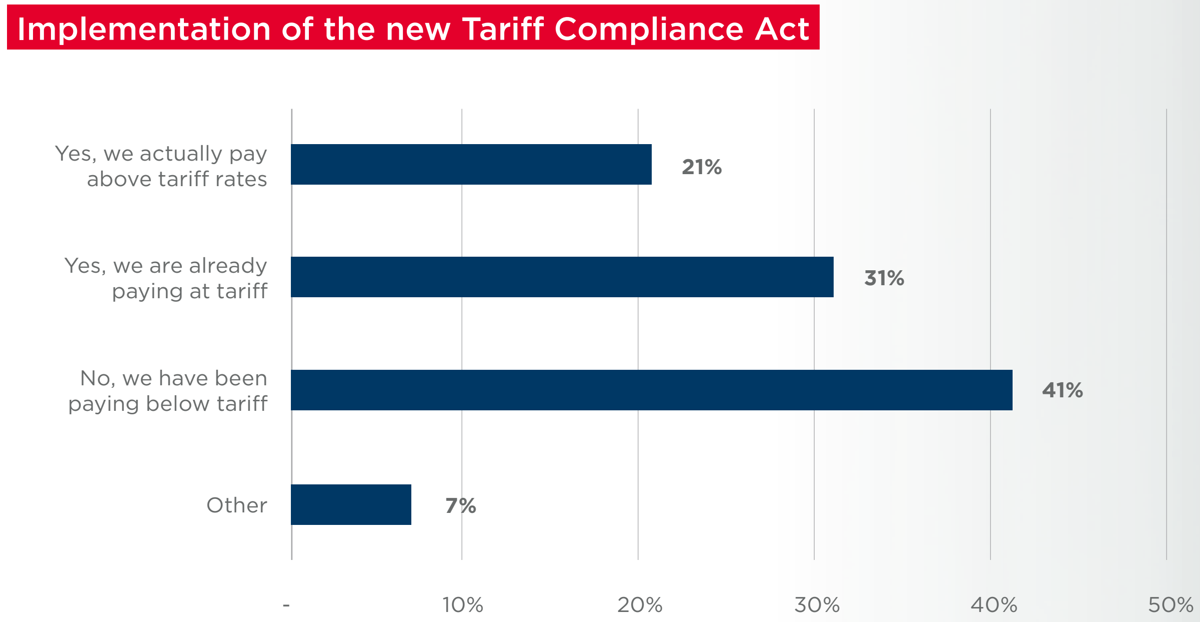
A quarter of those surveyed succeed in refinancing

The sharp rise in energy costs is a challenge for many companies and can have a negative impact on the overall economic results – three quarters of the respondents report a decline in their operating profit, albeit to varying degrees: 11 percent saw a significant decline of more than 10 percent, another 17 percent recorded declines of 5 to 10 percent. The largest proportion, 31 percent, described a moderate decline of 2.5 to 5 percent and 17 percent a slight decline of less than 2.5 percent.

Nevertheless, almost a quarter of the companies were able to refinance the increased energy costs and thus had no loss in operating profit. This highlights the importance of efficiency measures, cost management and cost reimbursement opportunities to mitigate the impact of rising energy costs on overall results.

TARIFF COMPLIANCE ACT IN PRACTICE

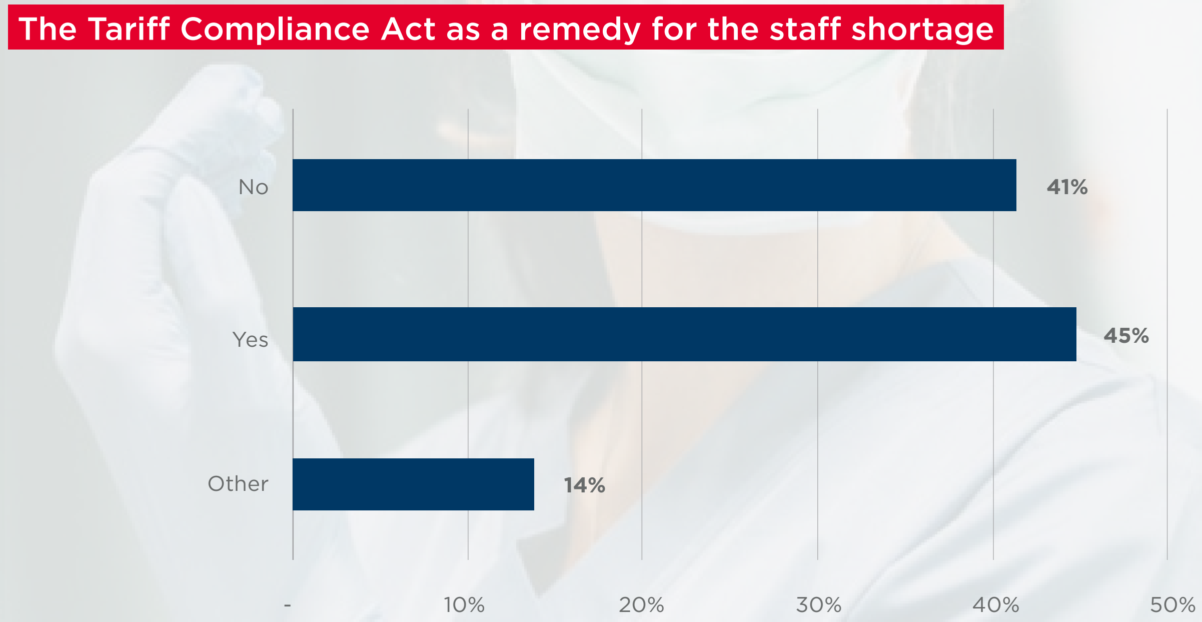
BURDEN OR OPPORTUNITY?



Divided view of the change in the law

Since September 2022, the care sector throughout the country must also pay its employees in accordance with collective agreements, which in some cases leads to higher personnel costs. The survey shows that more than half of the companies already paid according to collective agreements before the introduction of the law and thus meet the new standards. It is noteworthy that 21 percent have even paid above the collective wage agreement level in order to offer their employees better conditions. This may be a sign of an appreciative corporate culture and the desire for qualified and motivated employees.

However, the responses also show that quite a few companies have paid below-tariff wages. The wage adjustments now mean an additional burden on them, as well as the people in need of care, who sometimes have to pay significantly higher personal contributions. At the same time, it could be an opportunity to improve their own position in the competition for workers.



Does the new Tariff Compliance Act help to attract employees?

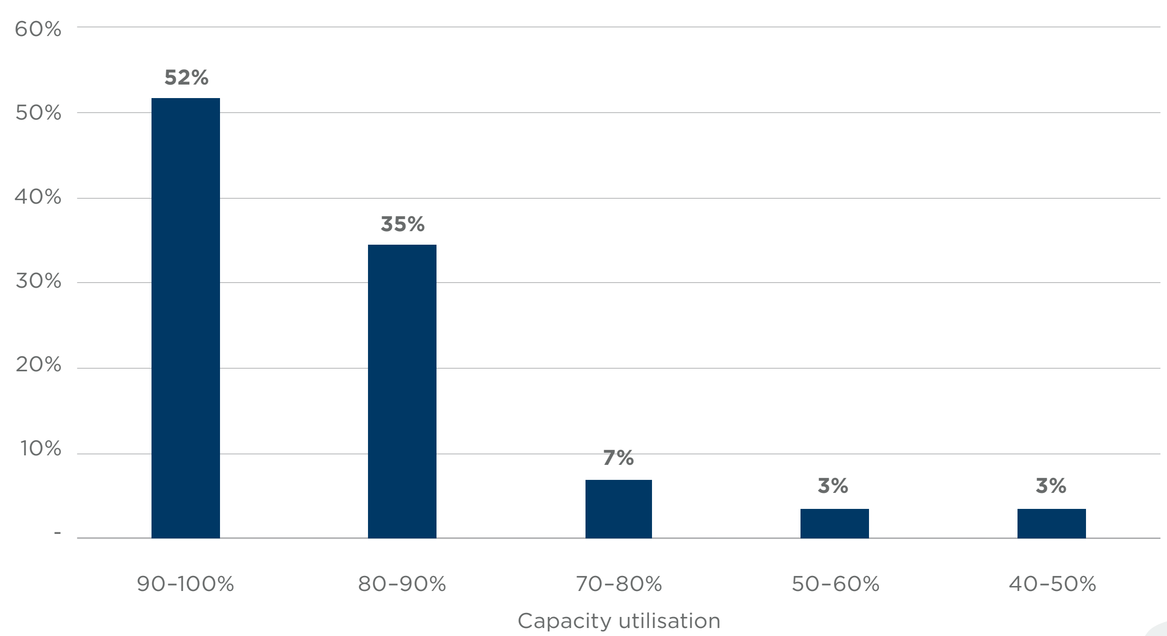
The opinions of the respondents are divided: While 41 percent of the companies think that the law does not help to solve the staff shortage, 45 percent sees it as an opportunity for improvement.

Some operators think that the Tariff Compliance Act cannot be seen as helping to acquire unqualified staff. Another participant is of the opinion that the Tariff Compliance Act does not have an impact on the labour shortage, but ensures that fewer available workers move to other sectors.

It is important to take these different points of view into account and consider alternative measures to effectively address the shortage of employees and improve the staffing situation.

Find out more about the Tariff Compliance Act instead of conformity

Capacity loss due to shortage of personnel



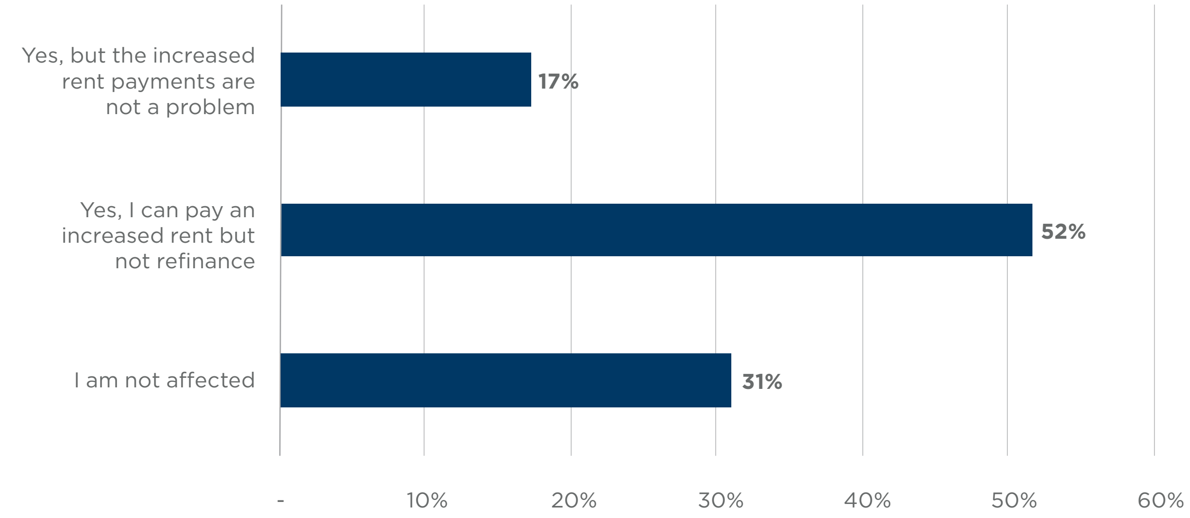
Lack of staff leads to reduced capacity utilisation

Staffing ratios prescribe the ratio of care staff to persons in need of care depending on the type of facility. This leads to the situation where facilities with too few staff can no longer fully utilise their bed capacities. This is also reflected in our survey results: Although 87 percent of the respondents achieve occupancy rates of 80 to 100 percent, 10 percent have to accept losses of 20 to 50 percent, and a small proportion is even below that.

RENT PRICE RISES DUE TO INFLATION

A PROBLEM FOR OVER A HALF OF OPERATORS

Are operators affected by rent rises?



Alternative financing options sought after

Due to index regulations in tenancy agreements, the rise in inflation often led to higher rents. We asked the participants to what extent they felt this. The results show that inflation-related rent increases affect a good two-thirds of the companies, although they are not a problem for all of them.

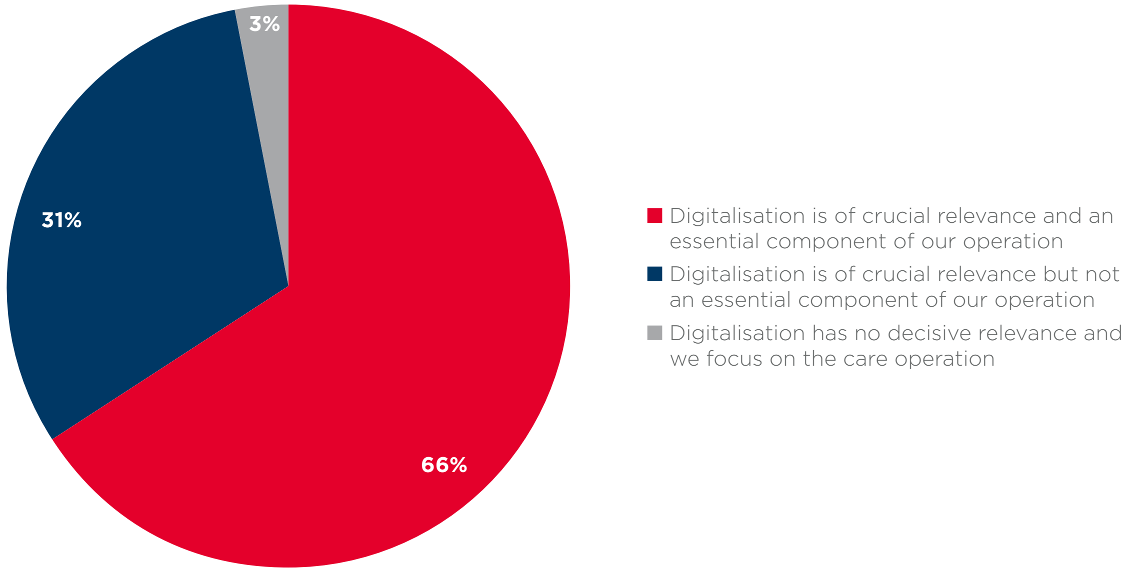
A majority of the companies, some 52 percent, report difficulties in covering the additional costs and have to seek solutions to finance them. On the other hand, 17 percent are able to bear the higher rental costs. It seems that these companies have sufficient financial resources or refinancing options. 31 percent of the respondents stated that they are not affected by rent increases. It may be assumed that these companies either have leases without indexation clauses or that the inflationary impact on rent payments has not yet been felt by them.

Overall, operators are likely to be currently seeking alternative financing or negotiating with landlords to counteract the impact of inflation on rent levels and reduce the financial burden.

CARE PROVISION AND DIGITALISATION

ALREADY A REALITY FOR MOST OPERATORS

The relevance of digitalisation for operators of care real estate



Almost all operators see digitalisation as crucial

From electronic documentation to nursing robots – digitalisation has found its way into many nursing areas. Our survey results reflect this: with 97 percent, almost all operators attribute a significant role to digital technologies, even if their actual integration into everyday life varies.

At 66 percent, a clear majority say they already use digital technologies as an essential part of their business operations to optimise processes, improve communication and possibly open up new business opportunities – thus increasing their efficiency and remaining competitive.

For 31 percent, digitalisation is a relevant but not an essential part of their business operations. These companies also recognise the value of digital technologies and may use some digital tools, but have not implemented a comprehensive digital transformation.

Only a 3 percent stated that they focus exclusively on nursing operations and do not attribute a relevant role to digitalisation. These companies have so far made little or no use of digital solutions in their operations and instead rely on conventional management.

The results are thus also an indicator that companies that have been reluctant so far should examine the advantages and potential of digitalisation more closely and take suitable measures to increase their efficiency and connectivity in competition.

LIVELY – A MODERN OPERATOR CONCEPT FOR SENIOR LIVING

REPORT FROM THE FIELD WITH **CHRISTINA KAINZ**

lively is a very fresh new operator of senior living facilities with a special focus on living forms integrated into open neighbourhoods with strong local structures. In Gronau, Münsterland, such a living concept is currently being created for the first time, with apartments catering to various requirements as well as extensive communal areas to accommodate the desire for company, family and friends.

Can you give us a brief insight into thelively concept?

The innovative lively living concept has evolved from our initial idea of carrying over the design and service mentality from the hotel sector to senior living and positioning ourselves as a real host. With it, we want to create the best offer on the market to sustainably improve our society. To do so, we use our experience from the hotel sector and combine it with the senior living and co-living models.

Our vision is to enable people to have a better quality of life into old age – we want people to require care later and live actively for longer. In doing so, we aim to create a cheerful atmosphere for our residents, focusing on quality of life by promoting mobility, joie de vivre and self-determination.

We place particular emphasis on promoting an active community, which is deliberately created by our staff in spacious and modern communal areas. A varied programme of courses and classes, which are also open to the entire neighbourhood, fosters social contact between the generations. The residents are closely involved in the make-up of the programme and are also motivated to share their own talents as part of an event programme.

In addition, we place great value on an intuitive, barrier-free interior design as well as our open interface digital platform. We want to create an open, modern and digital building in which the lively residents and everybody else in the neighbourhood can achieve self-actualisation and have a great time together.

You recently carried out a capital increase – what are your goals in doing this?

We are proud to have completed another round of financing in the current market environment, as it is important for us to stand by our partners as an attractive and, above all, stable and long-term operator. The fact that all our shareholders supported this round also shows the successful direction in which the project closest to our hearts, lively, is developing. We would like to use the capital to advance our digital platform, grow our staff structure and push ahead with location expansion.

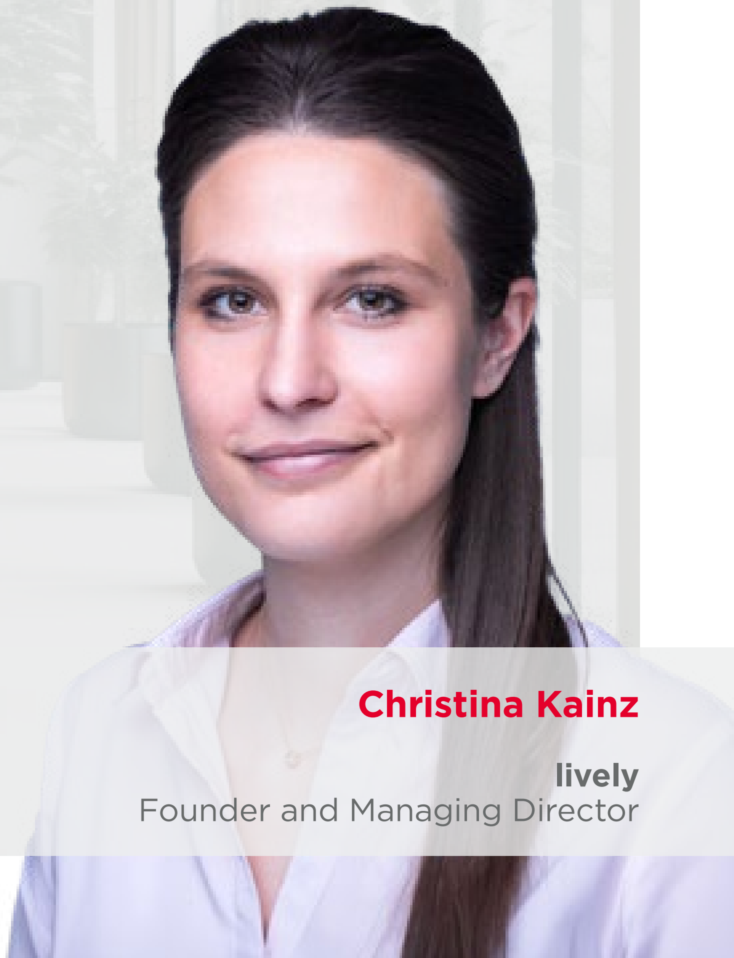
Your first project, White Lady Gronau, opens in early 2024. What makes this project special and sets it apart from other assisted living projects?

The White Lady project in Gronau has a very special significance as the first lively location. Not only because we put our entire heart and soul into it, but also because we are beginning a new era for the senior living sector there. As a listed former spinning mill, the building itself is an absolute gem and provides the ideal conditions to bring our vision to life. In addition to the 127 apartments, we will provide almost 1,000 square metres of versatile communal areas, which will imbue the property with a high quality of stay, thanks to the work of JOI Design, the interior design firm. With our modern approach, we will inspire the senior citizens on site to create a unique atmosphere together with us, which is how we all want to live!

As a new operator – how are you dealing with the current staff shortage, digital technologies and high staff costs as well as the other challenges facing the care industry?

We firmly believe that the good, modern and innovative operators with an identifiable and authentic corporate culture will prevail. As long as we live this culture and let everyone participate, we will find exactly the people who want to walk this path together with us.

> “Our small neighbourhood consisting of a kindergarten, café, day care and lively community makes it possible to form an open network in which everyone is welcome and at home.”



Christina Kainz

lively
Founder and Managing Director

Something that creates a degree of flexibility for us, with regard to the industry specific staff shortage, is the fact that our team members do not provide care at an operational level. Our team is purely responsible for bringing the spaces to life and creating a community, which is why our search radius is very broad. The care itself is provided by external care providers, whom we integrate closely into our structures and provide with appropriate premises. In this way, we draw on existing care structures at the location and are not dependent on a single provider.

From our hotel-sector experience, we are used to digitally-driven work and therefore bring a great passion, while thinking of lively in very digital and scalable terms from the start.

Operators are increasingly scrutinised by investors for their creditworthiness and sustainability. How can you assure investors' security in the purchase of a property with you as the operator?

In creating lively, it was very important to us from the beginning to be solidly-positioned and to lead the company to success through organic growth. We always remain true to this premise, so that our partners can rely on having someone at their side who acts with humility, is down-to-earth and has a long-term approach. For us, the quality of the product as well as our corporate culture are more important than overly ambitious expansion goals, under which our vision would suffer. As operators, we provide standard market sureties and give our landlords access to our daily reporting in order to create trust.

What is your position on the issue of green leases and increased reporting obligations when signing leases?

In general, we are very positive about the topic of "green leases" and recognise that there is no alternative. Sustainability plays a major role in our corporate philosophy, and we are implementing this hand-in-hand with the owner in our first project in Gronau, a large-scale building to KfW Efficiency House 40 EE Standard. In our view, operator obligations in this context have positive effects at operational level, because only those who are aware of their energy consumption and carbon footprint can change them. This transparency has great potential for raising every employee's awareness of the individual, ecological and financial impact and for regular reflection on the current status combined with considerations of what we can do better. We are fortunate to be able to set up all our new processes accordingly against this background, and we want to use this opportunity proactively. This is also the reason why we give our property owners access to our business intelligence tool, which shows the KPIs on a daily basis.

lively was founded in 2021 by Constantin Rehberg and Christina Kainz. The senior living operator carries over the design and service mentality of the hotel sector to senior living. lively's innovative concept offers a new form of living that promote self-determined and healthy life in old age and forms an active community. Following the motto "ambulant before inpatient", lively creates residential quarters in which flats with common areas and basic services as well as flexible optional services are available. The residential quarters are to comprise at least 80 flats and around 4,000 square metres of floor space. lively will open the first 127 apartments in lively White Lady Gronau in Q1 2024 and is planning two-to-four new locations per year in its expansion strategy.

AIUTANDA – FLEXIBLE OUTPATIENT CARE

MARCEL MÜLLER-RECHENBACH AND **SEBASTIAN WEBER** IN INTERVIEW

aiutanda offers outpatient health care and living support for a variety of needs throughout Germany. As an amalgamation of service providers with a variety of emphases, aiutanda is able to respond to the individual wishes of those requiring care in terms of time, location and expertise.

What is your expansion strategy? Are you still looking for new premises to lease or are you concentrating on managing your current portfolio?

aiutanda currently already has 18 contractually concluded projects and will implement these with various investors over the next few years. We continue to focus on expansion, with the aim of developing existing spaces in regional clusters and conurbations and extending them accordingly. An aiutanda space is created wherever we provide care for people via our employees: No matter WHAT: We offer individual solutions, regardless of the service area – such as everyday help, assistance, aids, therapy management, or 24-hour care. No matter WHEN: We are flexibly available, no matter at what time – by the hour, by the day, by the month, on call and more. No matter WHERE: We offer individual concepts, no matter where – for example, at home, in day or short-term care, in serviced living, in comprehensively assisted living or residential communities.

Staff shortages in the care sector are omnipresent. How do you recruit new specialist nursing staff?

We present ourselves in the market as a modern employer. For us, that means more than bright colours and flashy slogans in the application channels: We rely on targeted personnel support from the first contact onwards, as well as strategic, company- and strength-oriented personnel development, which supports us in retaining employees. This is reinforced by digital tools, such as applicant management software, which makes it easy for applicants to contact us. In this way, we increase satisfaction, which also leads to positive word-of-mouth. At the same time, we rely on a training concept that enables us to support our own competent junior staff in their development.

Do you see the Tariff Compliance Act as helpful here?

Attractive wages make a significant contribution to finding the right skilled personnel. The Tariff Compliance Act was designed to make the care sector more attractive. Thus, also due to the law, today's wages and salaries can hardly be compared to those of five years ago, which is positive for the sector from this perspective.

In our case, the law is helpful in finding the right skilled personnel, because as a larger company we have mostly succeeded in negotiating the necessary rates for refinancing personnel costs with health and long-term care insurance companies. Not every company succeeds in doing this, which is currently putting a lot of economic strain on some companies or has even led them to insolvency. With regard to other points such as practicability, implementation and refinancing, it has unfortunately proven to be too short-sighted.

At the moment, the Tariff Compliance Act in the sector is causing both clients and companies to find themselves in financially challenging situations: Costs that are not taken into account in the statutory care budget of the long-term care insurance funds, despite strong increases due to inflation, energy prices and the Tariff Compliance Act. This leads to lower utilisation of the facilities and to a reduction of services at home, because people can no longer afford necessary care services.

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> New generations of employees expect the use of digital solutions because they have grown up with them.
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This in turn leads to a psychologically and physically challenging situation for relatives who have to step in as a substitute if the care services necessary to maintain a life worth living cannot be provided by professional care providers. These relatives are then also not available or only available to a very limited extent on the labour market. The law is therefore well-conceived in terms of its goal, but unfortunately not nearly well-enough thought-out regarding implementation.

Is there any state support for financially burdened clients?

Assistance from social welfare is available in principle, but various obstacles stand in the way here: the mental hurdle for the clients of overcoming reluctance and stigma regarding social assistance,

Sebastian Weber

aiutanda GmbH
Partner
Head of Project Development

delayed processing of applications, refusal of benefits by the relevant offices, etc. This is where we come in and provide support with our staff who specialise in this topic.

Initially, the introduction of digital technologies means a great deal of additional work for companies and employees. Have you already digitalised work processes and what are your experiences?

Digitalisation also has beneficial effects in the care sector. Many routine tasks can be automated and thus made more efficient. This can help to use resources in a more targeted manner and relieve staff of administrative tasks, leaving more time for the actual care work.

Digital systems also make it easier and more systematic to collect patient data. This not only improves the overview, but also enables quick access to important information, which can increase patient safety. In addition, care facilities can monitor and optimise the quality of their services more closely and identify trends and problems more quickly and react accordingly.

Digital tools also help to simplify and improve communication between nurses, doctors, patients and relatives. This is important to avoid misunderstandings and ensure the flow of information. By analysing digitally captured data, it is easier to create and adapt individual care plans so that each patient receives exactly the care they need.

Of course, new generations of employees expect the use of digital solutions because they have grown up with them. Whether in e-learning, communication in teams and companies or in taking care of clients, there is no way around digitalisation. At aiutanda, we see these advantages and rely on state-of-the-art software-supported solutions, for example in the areas of recruiting and applicant management, administration, quality management, internal communication and in the office.

> Companies must increasingly acknowledge their environmental, social and societal responsibility.

Marcel Müller-Rechenbach

Pflege mit Leidenschaft Erfurt GmbH
Founder
aiutanda Süd-Ost GmbH
Managing Partner

Refinancing and thus also sustainable rents are becoming increasingly important in discussions. How are you experiencing the rise in costs?

Our industry has been facing major challenges for quite some time. Not least due to the pandemic, the development of energy costs and persistent inflation. Of course, this affects the entire economy and also the construction industry. We are in constant dialogue with our partners from the real estate industry and are working together on solutions that should ultimately enable affordable housing, even if this is currently becoming increasingly difficult. The proportion of welfare recipients has risen sharply in recent months. Political measures are needed to counteract this trend.

Many owners now want contractual stipulation of mutually binding sustainability goals ("green leases") and corresponding reporting obligations. How do you deal with the increasing demands and what opportunities and risks do you see here?

Companies must increasingly acknowledge and take-on their environmental, social and societal responsibilities in order to secure long-term advantages in terms of brand image, risk management and innovation. At aiutanda, we will fully comply with the legal requirements for sustainability reporting. The reporting requirements create opportunities in terms of transparency and thus the controllability of our efforts to positively influence this topic. Risks can arise from constantly changing legal regulations and the associated growing bureaucracy.

aiutanda is a group of ambulant health care providers operating throughout Germany offering professional health and life support for people requiring assistance and care. The range of services includes a wide range of care services, including services up to 24-hour care, everyday help, outpatient care services as well as individual therapy management and a reliable supply of aids. The offers are unlimited in time and place and can be used flexibly at home, in one of the forms of accommodation or on holiday, depending on your needs. aiutanda's services are available anytime and anywhere, according to the needs and wishes of the people in need of assistance.

CONTACT

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Jan-Bastian Knod
International Partner
Head of Residential Investment
Head of Healthcare Advisory

T +49 69 50 60 73 261
E jan-bastian.knod@cushwake.com

Maximilian Merkel
Consultant
Healthcare Advisory
Residential Investment

T +49 69 50 60 73 234
E maximilian.merkel@cushwake.com

Benedikt Kiefer
Consultant
Healthcare Advisory
Investment Advisory

T +49 69 50 60 73 266
E benedikt.kiefer@cushwake.com

Max Koehler
Associate
Valuation & Advisory Services

T +49 69 50 60 73 225
E max.koehler@cushwake.com

Verena Saskia Bauer
Head of Marketing & Communications Germany

T +49 69 50 60 73 360
E verena.bauer@cushwake.com

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