

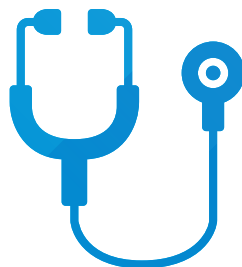


NATIONAL CENTER FOR  
THE MIDDLE MARKET

# HEALTHCARE

MIDDLE MARKET INDICATOR

## 4Q | 2019



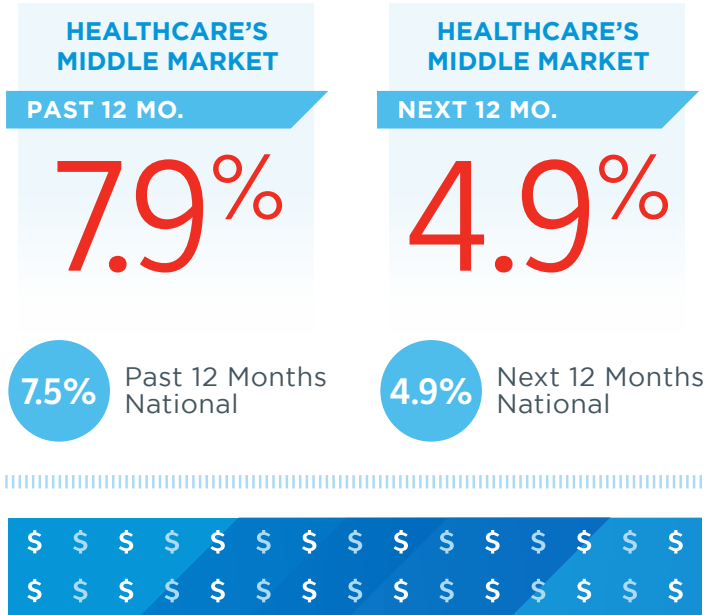
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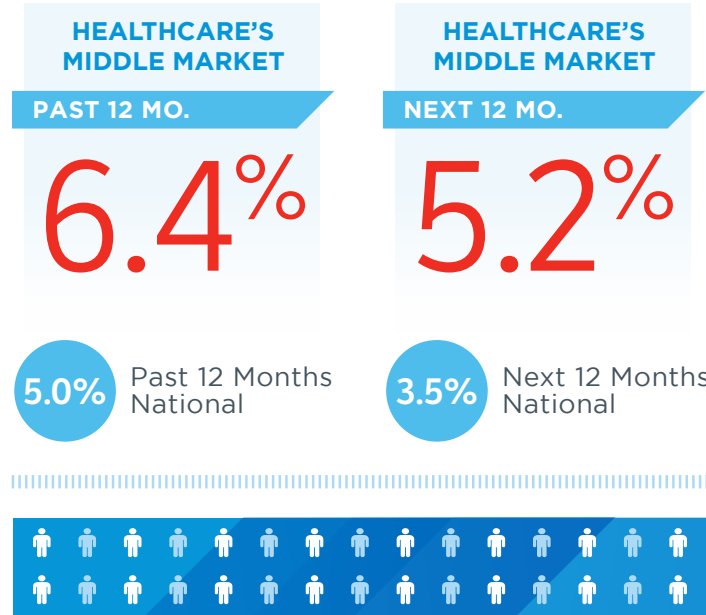
THE OHIO STATE UNIVERSITY  
FISHER COLLEGE OF BUSINESS

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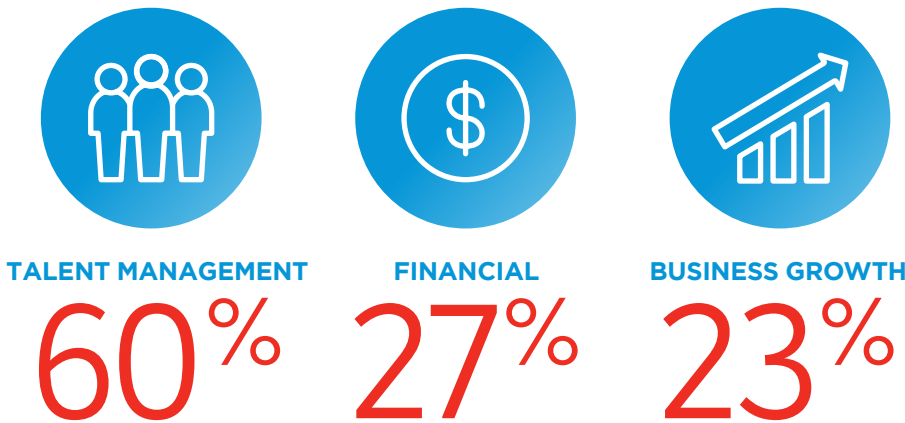
### Healthcare's Revenue Growth vs. National



### Healthcare's Employment Growth vs. National

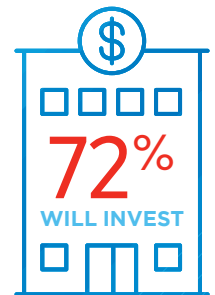


### Healthcare's Top Internal Challenges Over The Next 3 Months



### Preparing for Growth Through Capital Investment

WILLINGNESS TO INVEST HAS INCREASED AMONG MIDDLE MARKET HEALTHCARE COMPANIES SINCE LAST QUARTER'S REPORTED 64%.



VS. NEXT 12 MONTHS

TALENT MANAGEMENT	COSTS	BUSINESS GROWTH
49%	14%	14%

## Healthcare's Middle Market Defined

ANNUAL REVENUE  
**\$10 MM-\$1B**



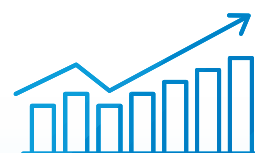
REPRESENTS  
**0.9%**  
OF ALL HEALTHCARE  
COMPANIES

MORE THAN  
**12,700**  
BUSINESSES



EMPLOYS  
**36.8%**  
OF THE HEALTHCARE  
WORKFORCE

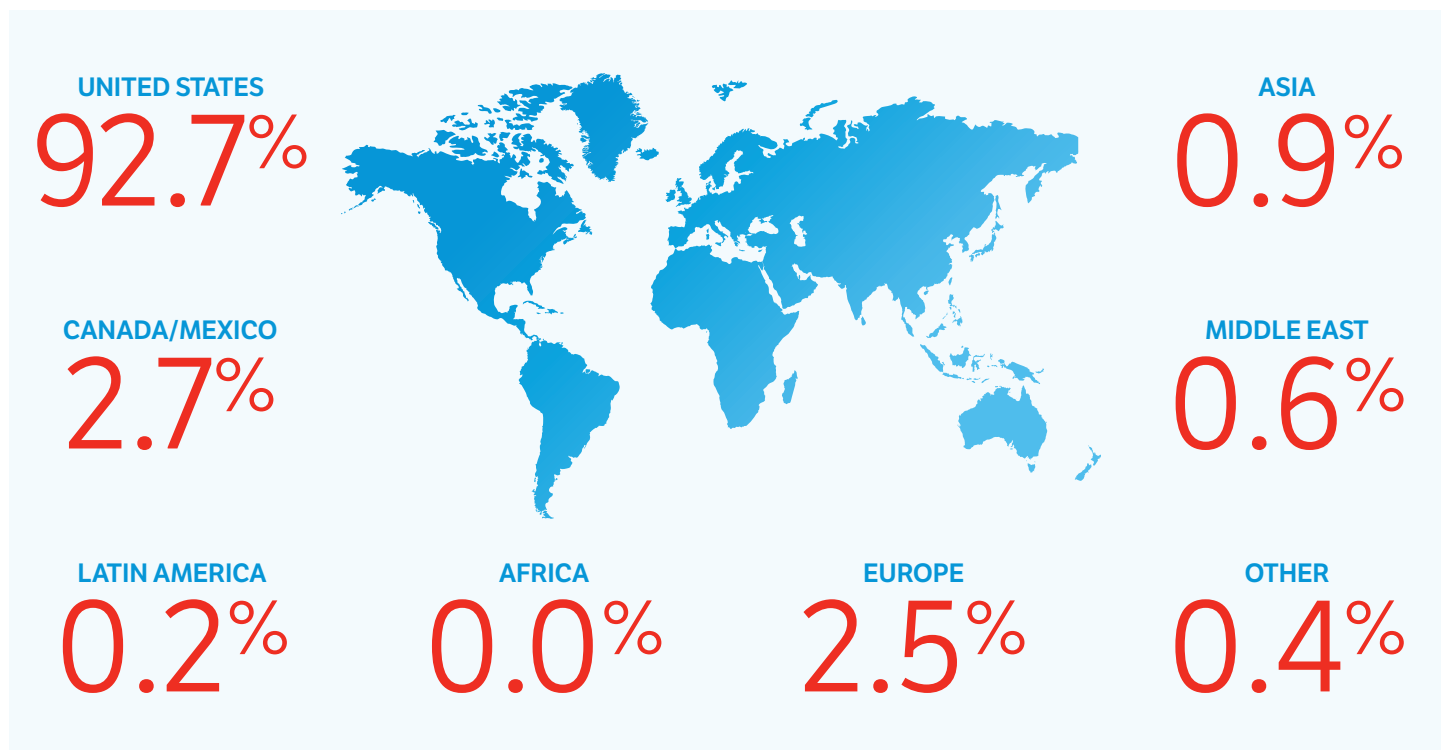
GENERATING  
**\$765B**  
IN ANNUAL REVENUE



GENERATES  
**44.1%**  
OF ALL HEALTHCARE  
BUSINESS REVENUE

Source: 2014 D&B Data

## Healthcare's Percentage of Revenues Around the World



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