Healthcare’s Revenue Growth vs. National

<table>
<thead>
<tr>
<th>Past 12 MO.</th>
<th>Next 12 MO.</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.9%</td>
<td>4.9%</td>
</tr>
</tbody>
</table>

7.5% Past 12 Months National
4.9% Next 12 Months National

Healthcare’s Employment Growth vs. National

<table>
<thead>
<tr>
<th>Past 12 MO.</th>
<th>Next 12 MO.</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.4%</td>
<td>5.2%</td>
</tr>
</tbody>
</table>

5.0% Past 12 Months National
3.5% Next 12 Months National

Healthcare’s Top Internal Challenges Over The Next 3 Months

- Talent Management: 60%
- Financial: 27%
- Business Growth: 23%

Preparing for Growth Through Capital Investment

Willingness to invest has increased among middle market healthcare companies since last quarter’s reported 64%.

72% Will Invest

<table>
<thead>
<tr>
<th>VS. NEXT 12 MONTHS</th>
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</thead>
<tbody>
<tr>
<td>Talent Management</td>
</tr>
<tr>
<td>49%</td>
</tr>
</tbody>
</table>
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

- **UNITED STATES**: 92.7%
- **CANADA/MEXICO**: 2.7%
- **LATIN AMERICA**: 0.2%
- **AFRICA**: 0.0%
- **EUROPE**: 2.5%
- **MIDDLE EAST**: 0.6%
- **ASIA**: 0.9%
- **OTHER**: 0.4%

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