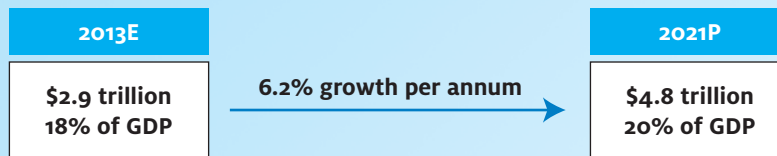


DEVELOPING DATA

Data from the Centers for Medicare and Medicaid Services and Aetna show that as the cost of health care treatment continues to rise, urgent care offers a compelling low-cost alternative for delivering care outside the hospital. By transitioning unnecessary emergency department visits to urgent care, \$18 billion in savings is projected to be possible.

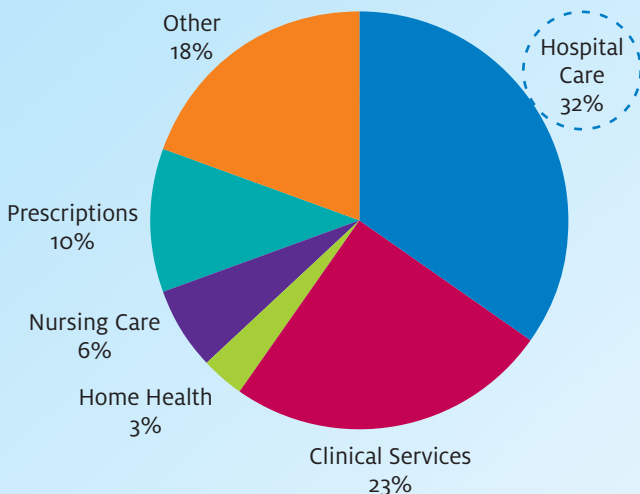
In this issue: Low-Cost Setting as a Driver of Urgent Care Industry Growth

Total U.S. spend on health care is expected to grow 6.2% annually, with 32% occurring in hospital settings

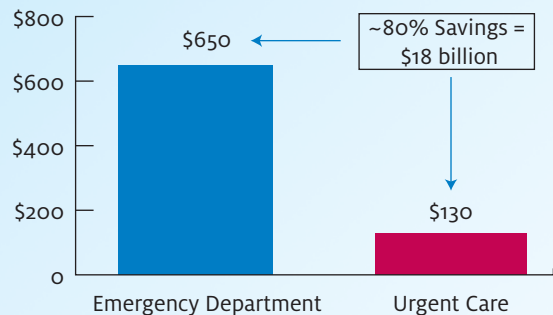


\$18 billion in potential savings by transitioning unnecessary emergency department visits to urgent care.

U.S. Health Care Expenditures
For the Year Ending December 31, 2013E



Urgent Care Cost Savings vs. Emergency Department
For the Year Ending December 31, 2012
(\$ in actuals)



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