



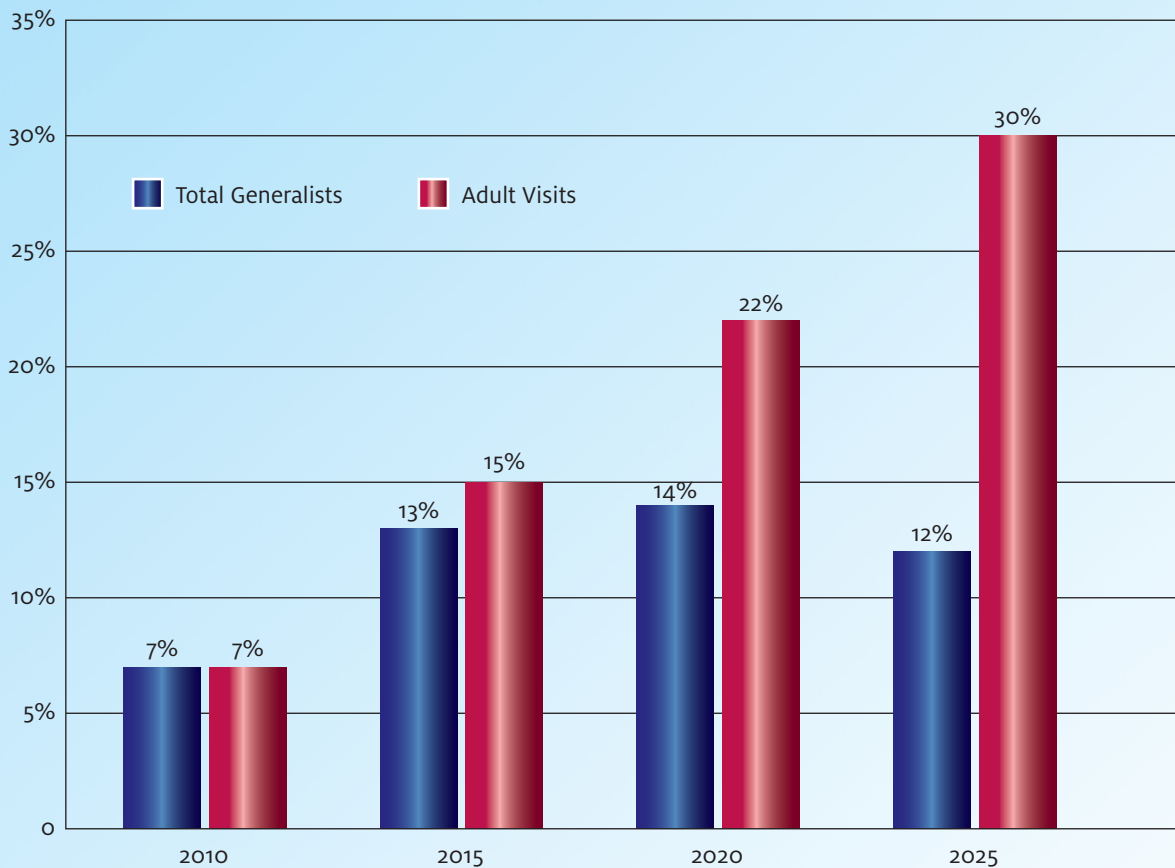
DEVELOPING DATA

Data from the Bureau of Health Professionals show that lack of access to primary care in the United States is driving the heightened demand for urgent care utilization. As of 2013, approximately 60 million individuals in the United States lacked access to primary care, an increase from 56 million in 2007. The lack of access is driven by a number of factors, including inconvenient hours, stringent scheduling requirements, and overcapacity at primary care physician offices.

In this issue: Lack of Access to Primary Care as a Driver of Urgent Care Industry Growth

CHANGE IN GENERAL PHYSICIANS VS. ADULT PATIENT POPULATION

For the Years Ending December 31, 2005-2025
(% change relative to 2005; numbers for 2015 and beyond are projections)



Patient visits are projected to grow 30% by 2025, while the supply of generalist physicians will only grow 12%.

Source: Healthcare @ Life Sciences (HCLS) Group at Harris Williams @ Co.