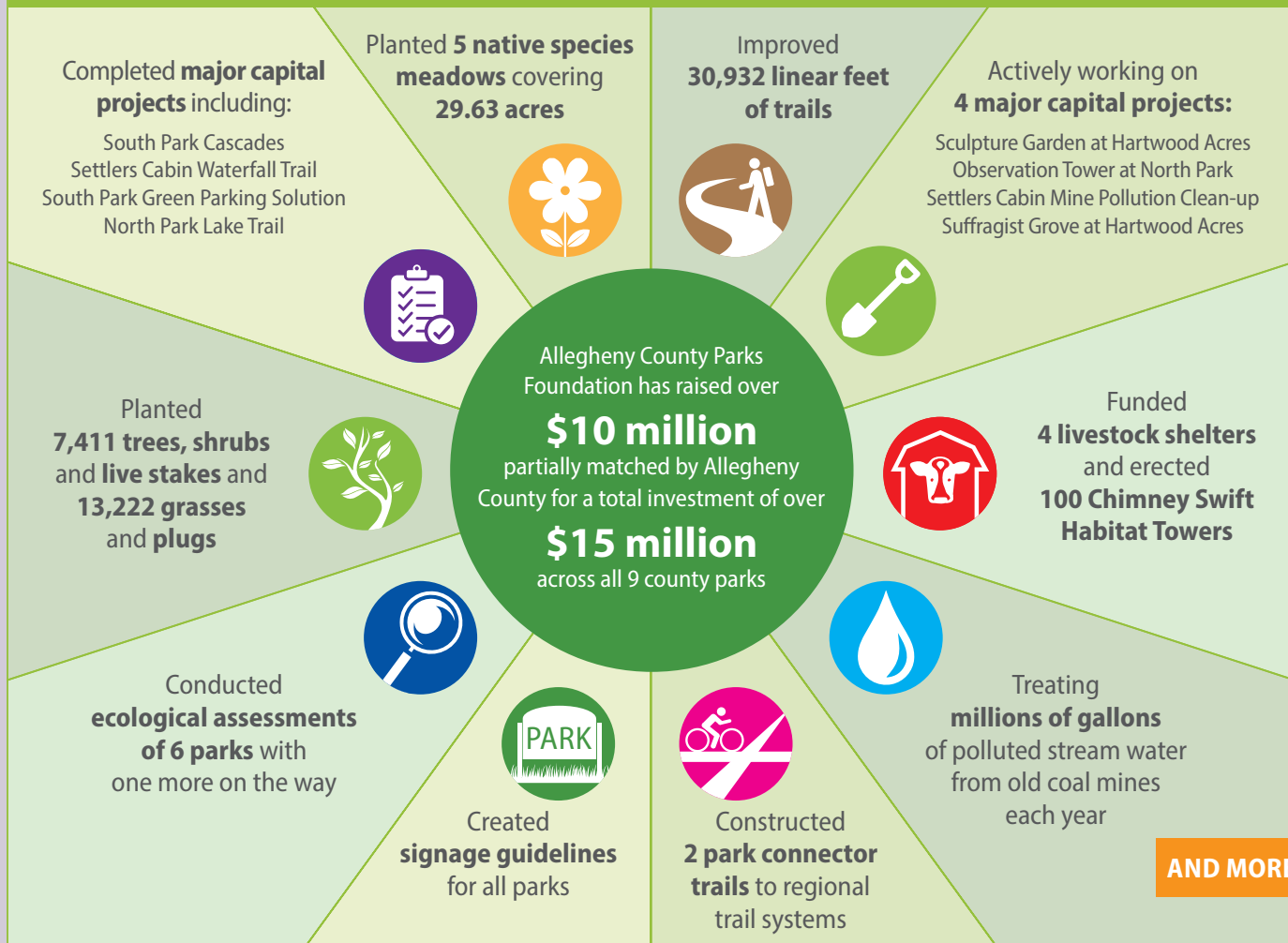


PARKS FOUNDATION BUILDS BETTER OUTDOOR OPPORTUNITIES



ALLEGHENY COUNTY'S 9 PARKS GET **22 million visits every year***

PROJECTS OF THE PARKS FOUNDATION:



9 ALLEGHENY COUNTY PARKS Boyce, Deer Lakes, Harrison Hills, Hartwood Acres, North, Round Hill, Settlers Cabin, South, White Oak

Allegheny County Parks offer year-round recreation, with **279** facilities to rent, **2** golf courses, **4** pools, **2** skating rinks, **1** ski slope, **4** lakes, **23** creeks and streams, and **200** miles of trails.



ALLEGHENY COUNTY PARKS TOTAL **12,000 acres**

Allegheny County Parks Foundation | 675 Old Frankstown Road, Pittsburgh, PA 15239 | 724.327.7627 | acparksfoundation.org



* Statistics based on 2016 survey conducted by Allegheny County Parks Foundation

INNOVATION WORKS/EY REPORT TRACKS 10 YEARS OF GROWTH

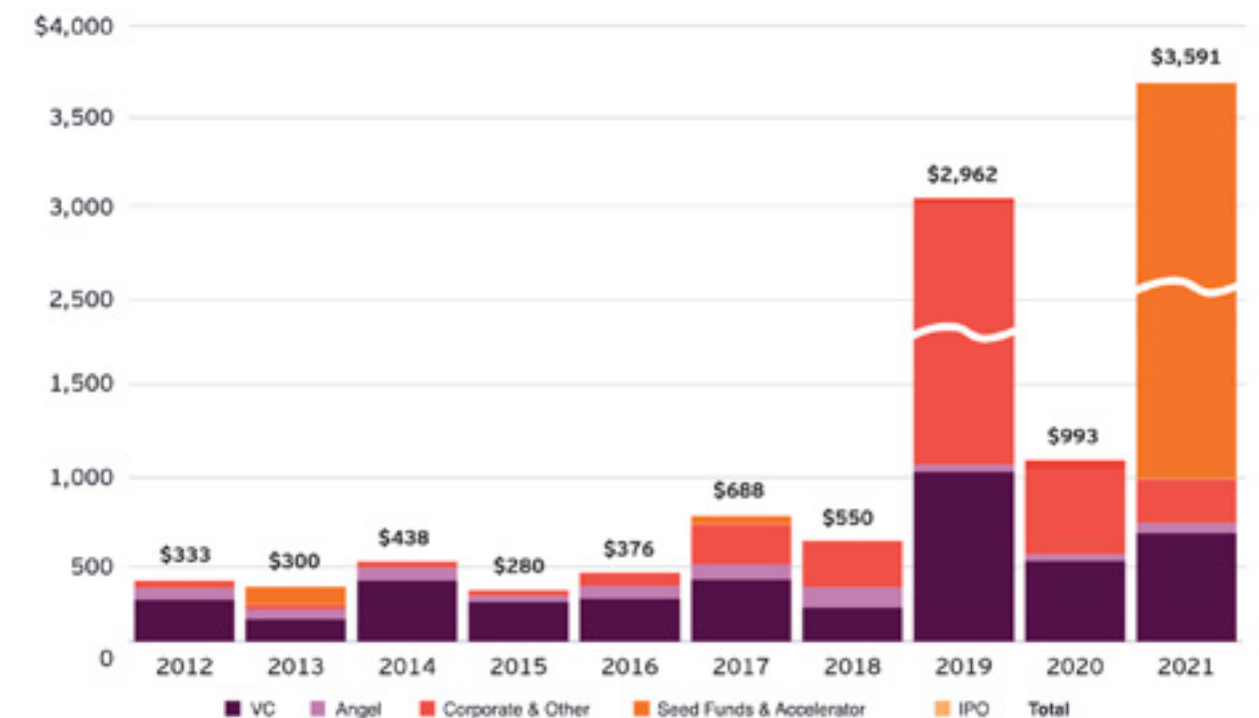


Pittsburgh's technology ecosystem has flourished in the past 10 years. The amount of annual capital invested increased more than tenfold to \$3.6 billion from 2012 to 2021. Pittsburgh has emerged as a hub for autonomy, robotics, AI and the life sciences. Aurora and Argo AI established Pittsburgh as a leader in self-driving cars, Duolingo in Edtech, and Krystal Biotech, Cognition Therapeutics and Knopp Biosciences lead the life science ecosystem. Scan the QR code for the full report.

Ernst & Young LLP and Innovation Works, Inc. are proud to present our 10th annual review of Pittsburgh's technology investment landscape. This report provides a comprehensive review of investment and exit activity in the Pittsburgh region for 2021 and highlights key trends for 2012–2021.

- ▶ In the past 10 years, the amount of annual capital invested increased more than tenfold to **\$3.6 billion** from 2012 to 2021.
- ▶ Over **300 firms** from around the world invested in Pittsburgh companies in the last 10 years, including **16 making** their first investment in our region in 2021.
- ▶ Pittsburgh's world-class technical capabilities and talent and the **\$11 billion of university research** over the past decade fueled regional growth.
- ▶ There have been **\$21.3 billion of exit proceeds** over the past decade, making Pittsburgh an attractive destination for global investors, talent and companies alike.

DOLLARS INVESTED IN PITTSBURGH TECH COMPANIES (\$MILLIONS)



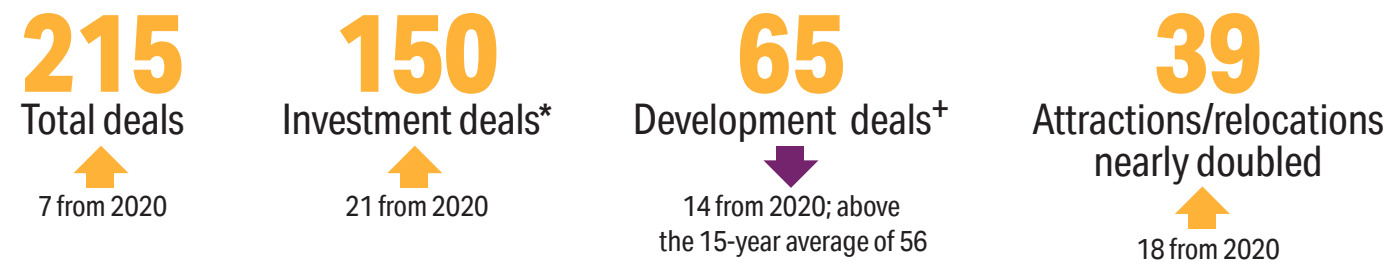
Source: PitchBook Data, Inc., Innovation Works
innovation works



BUSINESS INVESTMENT DEALS MAINTAIN STRONG PACE IN 2021

The Allegheny Conference details the latest Business Investment Scorecard tracking activity announced in the 10-county Pittsburgh region in 2021. The region experienced increases in nearly all major categories in 2021. Total announcements grew 3%, but remain below the 15-year average, while Investment announcements increased by 16%. Attractions of new companies nearly doubled, although new jobs exceeded the 15-year average. While development announcements fell, they remain below the long-term average. Total capital investment also showed a major increase.

BY THE NUMBERS



*Companies investing have plans to add or retain employees

+Infrastructure and brick and mortar real estate developments, not specifically tied to an employment impact

~\$3.0B Combined capital investment (CAPEX)
Totaling \$3B or more in five of the last six years.

\$391.2M
Investment projects CAPEX
Lowest on record and with half of the amount coming from four projects: Iron Synergy (Greene County), Stoelzle Glass (Beaver), Reinhardt Food Service (Westmoreland) and Pittsburgh Brewing (Allegheny)

\$2.5B
Development projects CAPEX
\$1B+ above the 15-year average; largest amount on record. Driven largely by Pittsburgh International Airport terminal modernization project

10,123
Total job impact
29% increase over 2020

8,405 New jobs
highest level since 2011

1,718 Retained jobs

56.3 Average number of new jobs per investment project
Second highest on record; driven by four projects announcing 500 or more jobs: Amazon (Allegheny County), Trulieve (Allegheny), Iron Synergy (Greene) and Express Med (Beaver)

BY THE SECTORS

MANUFACTURING

Most active for deals; first time since 2016

60 deals ↑ from 36 in 2020

Total job impact tripled to 2,664 new and retained jobs. At \$220M, manufacturing accounted for more than half CAPEX related to investment deals

TECH AND ROBOTICS

Second most active sector for deals trailing manufacturing; slipped from most active after a four-year run

31 deals ↓ from 38 in 2020

FINANCIAL AND BUSINESS SERVICES

17 deals

Total job impact increased fourfold to 1,920 ↑ from 535 in 2020

ENERGY

13 deals ↑ from 3 in 2020

Investment shift to companies focused on energy-related innovation, e.g., energy storage and carbon capture versus fossil fuel extraction and supply chain companies

HEALTHCARE AND LIFE SCIENCES

10 deals ↓ from 20 in 2020

Nine of 10 deals in life sciences; half the number in 2020

"Over the past 15 years, the Pittsburgh Region Business Investment Scorecard had proven to be an effective indicator of emerging trends in southwestern Pennsylvania's economy. A decade ago, it identified the growth of the region's energy economy."

"But in recent years, technology, robotics and life sciences became leading sectors. And in 2021, we saw the emergence of distribution centers and a rebound in manufacturing as key economic drivers. In this pandemic era, facilities such as manufacturing plants, distribution centers and R&D centers have captured a higher percentage of announcements. These are the types of facilities that could not be easily transferred to a remote or hybrid work environment."

– Jim Futrell, Vice President, Market Research, Allegheny Conference

"Amid pandemic-related economic recovery, we doubled down in 2021 – a year of transition – on playing to the region's strengths and their intersection with market demand. This included more interest from businesses looking to invest in American manufacturing, logistics capabilities to relieve supply chain bottlenecks and climate-related innovations – such as energy storage and carbon capture, both of which are essential to a low-carbon future."

"Our strategy helped to propel the Pittsburgh region's economy and lead to a rebound in investment project deals since 2020. Nearly \$3 billion in capital investment is tied to these and reflects companies locating to the region or expanding existing operations, as well as development projects such as new or improved real estate assets that underscore our message to companies worldwide: 'the Pittsburgh region is open for business.'"

– Mark Anthony Thomas, President, Pittsburgh Regional Alliance

WHO'S TRAVELING TO PITTSBURGH?

VisitPITTSBURGH is dedicated to generating business events, sports events and leisure travel business for the Pittsburgh region. VisitPittsburgh provided the information below on who is visiting Pittsburgh and where they're coming from.

2022 Trips to Allegheny County

Average Distance Traveled
273.4 Miles

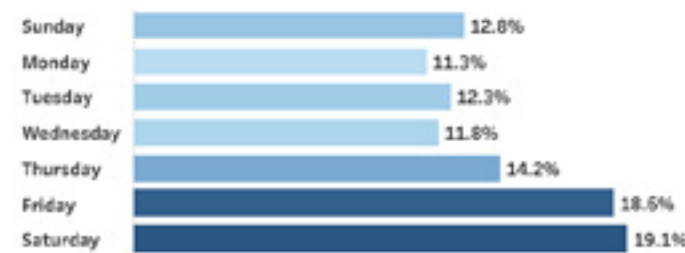
Top Origin Markets (DMAs)

DMA	Trips	Share of Trips	Average Unique Nig.
Johnstown/Altoona	389,709	12.4%	0.5
Youngstown	295,276	9.4%	0.3
Pittsburgh	240,310	7.7%	0.3
Cleveland	221,802	7.1%	0.6
Erie	192,791	6.2%	0.5
Philadelphia	162,862	5.2%	1.1
Harrisburg/Lancaster/Labanon/York	130,753	4.2%	0.8
Washington Dc	122,759	3.9%	1.1
New York	120,312	3.8%	1.2

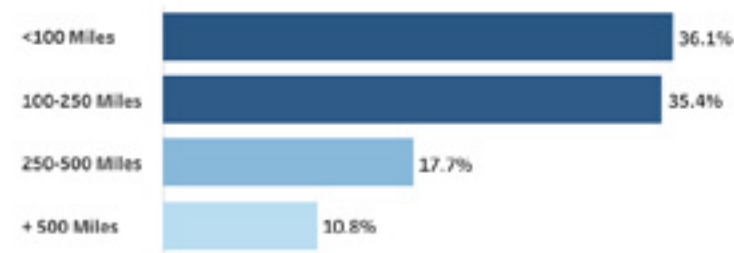
Trips by Origin States



Trips by Day of Week



Trips by Avg. Distance Traveled (Miles)



PITTSBURGH INTERNATIONAL AIRPORT

Passenger Traffic, Cargo, Terminal Modernization & Microgrid Project

Passenger traffic at PIT:

Passenger traffic and flights at Pittsburgh International Airport have continued to rebound from the pandemic, mirroring the national trend. PIT finished 2021 with a 74 percent increase in passenger traffic over 2020. British Airways resumed nonstop service to London Heathrow from PIT in June. Year-to-date through June 2022, total passenger traffic rose nearly 58 percent, an increase of over 1.3 million passengers. The airport currently (2022) serves nearly 60 nonstop destinations on 15 airlines.

Cargo:

More cargo passed through Pittsburgh International Airport in 2021 than at any point since 2004, meaning more jobs for the region as the industry capitalized on the airport's speed and efficiency. Nearly 250 million pounds of cargo shipped from around the world touched down at PIT in 2021, a 30 percent increase over 2020 and a 26 percent increase from 2019, as demand for air cargo soared amid global supply chain disruptions.

Year-to-date through June 2022, total cargo is up more than 6 percent, adding to last year's success. Cargo operations at PIT in 2021 generated more than \$950 million in direct and indirect economic impact to the region's economy.

PIT's new terminal project:

Pittsburgh International Airport is in the midst of a new \$1.39 billion terminal, the first in the country to be built from the ground-up post-pandemic.

The project is creating thousands of jobs and generating billions for the regional economy. Once complete, it will lower operating costs and make the airport more efficient and user-friendly.

According to an economic impact report, the new terminal, expected to open in 2025, will generate \$2.5 billion for the local economy and add some 5,500 local construction and skilled labor jobs, along with 8,500 other jobs. It will generate \$27 million in local tax revenue.

Modernization of the airport involves construction of a new 700,000-square-foot terminal that will include ticketing, security checkpoints and baggage claim. An adjacent complex includes a new 3,300-space parking garage, rental car facilities and new roadways.

Key design features of the new terminal and parking facilities are centered on elements of nature and sustainability, leading-edge technology and innovation in the community.

Microgrid:

Last year, Pittsburgh International Airport became the first major U.S. airport to be powered entirely by a 23 megawatt microgrid using natural gas and solar energy. The airport and surrounding campus are 100 percent powered by five natural gas-fired generators and more than 9,000 solar panels built atop an old landfill. Carbon dioxide emissions have been cut by more than 8 million pounds per year.

HEALTHCARE EXPERIENCE: Improve the Digital Patient Experience Beyond UI/UX

By SDLC Partners, a Citius Tech Company

Healthcare organizations face a business imperative to improve the front-end experience for consumers while ensuring the back-end systems and processes support seamless, simple, and comprehensive consumer encounters across all channels.

As consumers bear more of the cost of their healthcare, they expect a customer experience similar to what they enjoy from online retail, banking, and entertainment. Add to that the mounting pressures to meet increased satisfaction, care and compliance requirements and an ambitious standard has been set.

Healthcare experiences are driving the journey for all stakeholders, patients, members, family caregivers, employers and business and community partners. Each in-person, virtual or digital interaction holds the potential to either deepen or erode engagement and loyalty.

Why must organizations improve their healthcare experiences?

The consumerization of healthcare is too simple an answer. Several factors make "experience" paramount across all segments: payer, provider, life sciences, and medtech.

Regulations: Healthcare organizations can leverage new rules around surprise billing to improve transparency and empower patients through education and better experiences concerning price, cost, and financing options. Employers: With so many individuals using employer-sponsored insurance, employers now have even more influence and can make healthcare benefits a differentiator when recruiting talent.

Retail and digital-native disruptors: Convenience is king for consumers, and healthcare is continuing to shift after COVID-19 to support busy 24/7 lifestyles.

Virtual and hybrid care: Healthcare evolution over the past two years has forced an incredible adoption of virtual care, and now organizations are faced with the challenge of integrating virtual care into all of their other channels. Remote patient monitoring and hospital at home: Care-at-distance is also evolving across the realm of remote patient monitoring to keep patients out of higher-cost care locations.

The Holistic Healthcare Experience

Commonly, healthcare organizations purchase a host of point solutions rather than address experience holistically, which not only defeats their ultimate goal, but also creates a back-end patchwork that is incredibly costly and difficult to maintain, secure, and scale.

For External Consumers

Creating a better experience for consumers across all channels can be achieved by viewing the experience from four points:

Front-end user experience: The front-end user experience provides an opportunity to do more than present a fresh design. It is this digital front door that engages patients and members throughout their health journey, offering the level of access and interaction necessary to achieve the person's and institution's goals.

Back-end digital enablement: Often, improving digital patient experiences focuses only on the front-end aspects they can see, but it's crucial that the interface that delivers experience can do so on a foundation that connects disparate systems, data sources, and functionality for all of that to actually work.

Integrated operations and processes: Digital patient experiences are greatly influenced by cohesion behind the scenes. It's essential to harmonize patient touch points to ensure a seamless experience, no matter how or where someone digitally interacts with the organization.

Data to drive personalization: Data's value comes from its power to create a shift from episodic, interventional care to continuous, preventative healthcare that is personal yet population-focused. The healthcare experience can provide care coordination and management across digital tools and data sources.

This cohesive approach takes digital transformation beyond a tool, portal, or app and addresses the key areas that impact experience while tying experience to higher business and operational objectives.

For Internal and External Partners

Consumers aren't the only stakeholders wanting better experiences from healthcare. Employees, physicians, and employers also want a more streamlined and effective experience when engaging healthcare. They want to see their digital priorities addressed through their interactions as well.

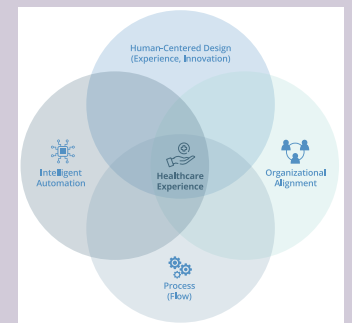
Focusing solely on consumers leaves out the care team members, physicians, and operations teams, which creates a glass ceiling to how much patient and member experience can im-

prove. Critical to delivering the right experience for these groups is deeper scrutiny of back-end processes and systems that drive data, insights, and recommendations. Prioritizing experience for other stakeholders can reduce wasteful spending, create much-needed efficiencies in care delivery, and improve employee morale, ultimately enhancing the consumer experience.

Ready to Revolutionize Your Healthcare Experience?

Improving the healthcare experience is a goal across nearly every healthcare organization, but actually making impactful changes can be hard. That's why it is important to work with experts in the space, such as SDLC Partners, to support you in making the critical strategic decisions that make the most sense for your entire healthcare organization and carry out plans successfully.

SDLC Partners takes a comprehensive approach to problem-solving by using a design thinking framework:



This approach has helped SDLC Partners drive results across complicated healthcare objectives, such as:

- Streamlining business partner experiences
- Implementing new business models by leveraging the digital transformation
- Reducing manual processes using intelligent automation
- Transforming operations and care with data sharing

There is an immense opportunity and responsibility to optimize and digitize the healthcare ecosystem to better serve patients and use resources more efficiently. To meet the demands of today's consumers, it's time for healthcare organizations to improve the digital patient experience and beyond.

Learn more at sdhcpartners.com.