



JULY 2019

TOP 25 INTEGRATED DELIVERY NETWORKS

Market Insights Report



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INTRODUCTION

Trinity Takes Top Spot in 2019 Ranking of Largest Healthcare Networks

Trinity Health of Livonia, Michigan, tops our list of the largest Integrated Delivery Networks (IDNs) in the U.S. With more than 2,336 facilities, this Catholic organization dominates the healthcare continuum largely through its expanding footprint of residential facilities. Trinity is also a strong player in the management of outpatient centers. Trinity employs about 9.7 physicians per facility.

Healthcare delivery in the U.S. has evolved rapidly over the past few years, causing a dynamic shift in how purchasing decisions are made. Economic challenges and the Affordable Care Act have driven the emergence of large care delivery networks with common branding that focus on better patient outcomes and cost reductions.

IDNs own or manage groups of hospitals, medical offices, nursing homes and other site types. To achieve economies of scale and holistic outcomes, decision making across these networks is centralized. IDNs have significant control over issues related to formulary, treatments, health IT adoption, commercial access, drug sampling policies, new product uptake and other protocols.

Report Methodology

The ranking of the Top 25 IDNs changes continuously as systems expand their networks and range through provider employment, affiliations and new management contracts. Our ranking is based on the total number of facilities for which an IDN has ownership and purchasing authority.

Through extensive primary research, trusted government and industry data, and customer input, IQVIA has identified approximately 960 IDNs with their headquarters location. IQVIA's OneKey database pinpoints key decision makers such as CEOs, presidents, VPs, formulary directors, department directors, administrators, physicians, mid-level providers and others.

This multi-dimensional database includes linkages to hospital sites, residential facilities, and outpatient centers such as medical groups and clinics. It is a comprehensive view of the IDN ecosystem. Like all IQVIA's information products, OneKey is continuously verified by a dedicated team of data stewards to ensure the highest level of accuracy and freshness.



INFLUENCERS OF PHYSICIAN TREATMENT BEHAVIOR

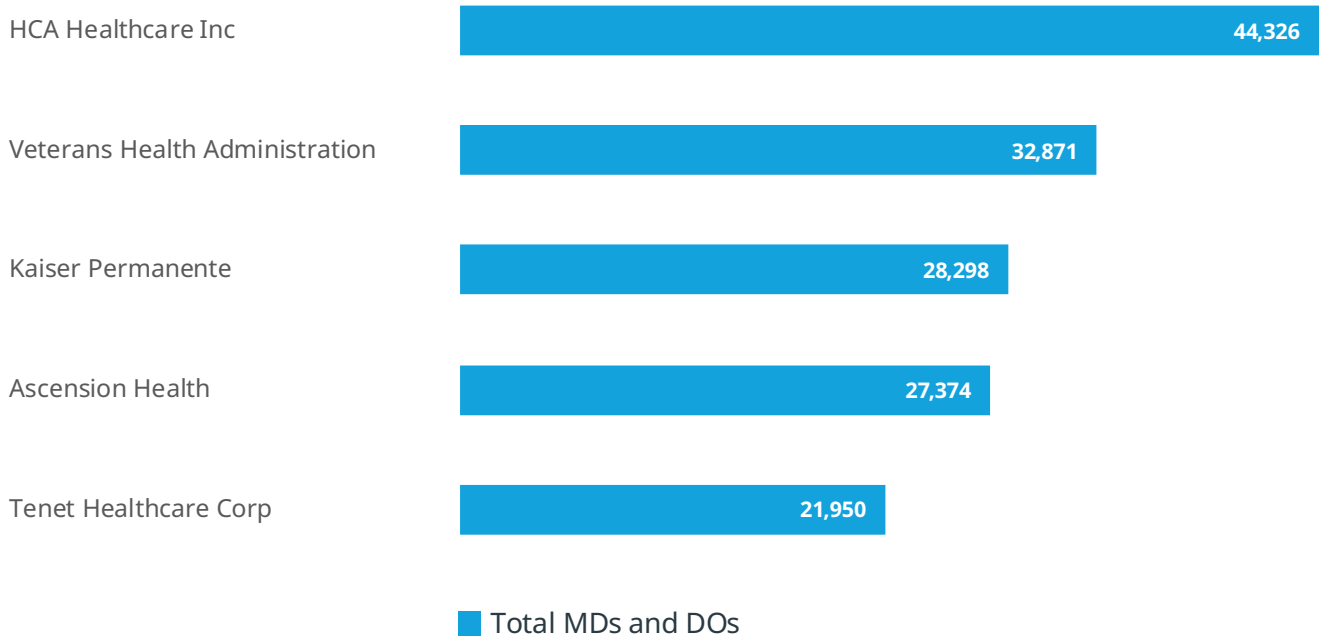
Integrated delivery networks are focused on expanding their networks and influence to meet population health management goals and objectives.

TOP 25 INTEGRATED DELIVERY NETWORKS

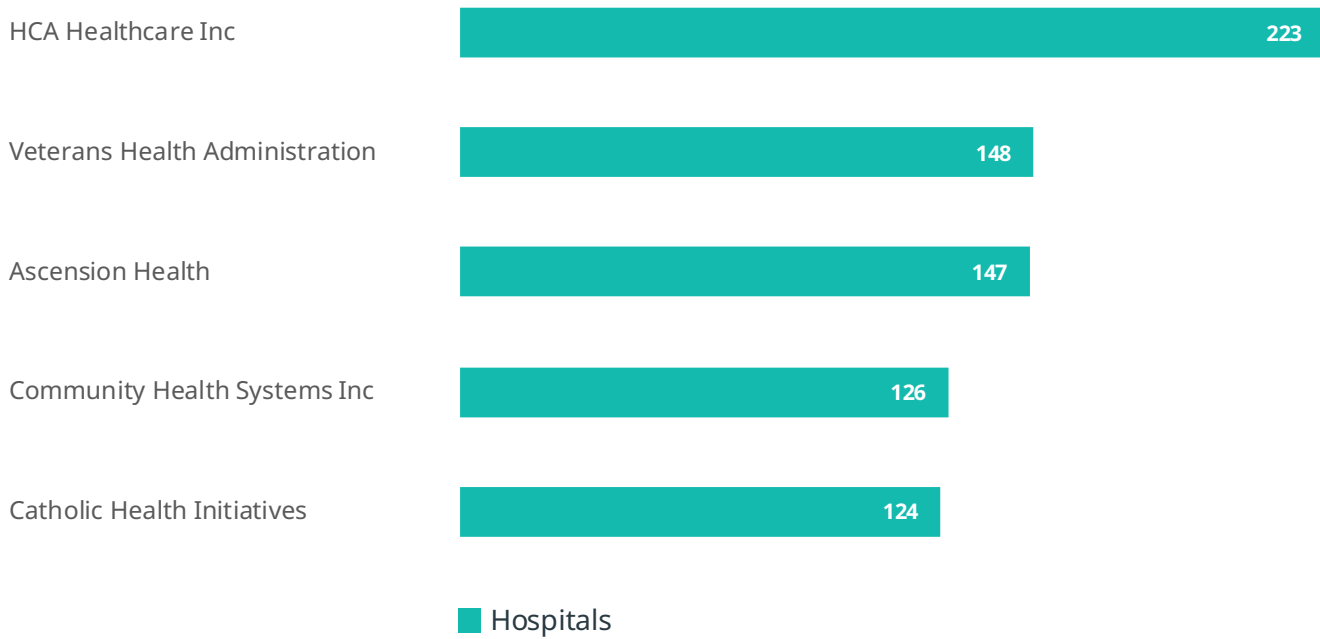
Rank	IDN Name	City	State	Hospitals	Outpatient Centers	Nursing/ Assisted Living	Total Facilities	Total MDs and DOs
1	Trinity Health	Livonia	MI	88	1,235	1,013	2,336	21,772
2	Ascension Health	Saint Louis	MO	147	2,007	123	2,277	27,374
3	HCA Healthcare Inc	Nashville	TN	223	1,560	7	1,790	44,326
4	Catholic Health Initiatives	Englewood	CO	124	1,401	112	1,637	16,269
5	Veterans Health Administration	Washington	DC	148	1,370	44	1,562	32,871
6	Providence Saint Joseph Health	Renton	WA	62	1,250	80	1,392	18,229
7	Community Health Systems Inc	Franklin	TN	126	1,202	62	1,390	15,815
8	Select Medical Corp	Mechanicsburg	PA	120	1,234	1	1,355	10,137
9	Tenet Healthcare Corp	Dallas	TX	96	989	10	1,095	21,950
10	UPMC	Pittsburgh	PA	46	1,045	1	1,092	9,608
11	Mercy	Chesterfield	MO	43	877	19	939	4,944
12	Bon Secours Mercy Health	Cincinnati	OH	35	857	45	937	4,818
13	UC Health	Oakland	CA	17	754	123	894	13,986
14	Atrium Health	Charlotte	NC	42	762	30	834	7,314
15	Sutter Health	Sacramento	CA	35	671	28	734	10,043
16	Kaiser Permanente	Oakland	CA	45	653	28	726	28,298
17	Northwell Health	New Hyde Park	NY	26	666	20	712	13,459
18	Adventhealth	Altamonte Springs	FL	40	578	38	656	9,416
19	Lifepoint Health	Brentwood	TN	70	522	27	619	6,107
20	Baylor Scott And White Health	Dallas	TX	34	578	6	618	5,974
21	Dignity Health	San Francisco	CA	46	510	22	578	14,138
22	Novant Health Inc	Winston Salem	NC	16	551	3	570	3,827
23	Indian Health Service	Rockville	MD	41	477	17	535	2,271
24	Partners Healthcare System Inc	Boston	MA	17	472	12	501	10,267
25	New York Presbyterian Healthcare System	New York	NY	11	485	4	500	7,945

TOP 5 INTEGRATED DELIVERY NETWORKS

RANKED BY TOTAL NUMBER OF PHYSICIANS

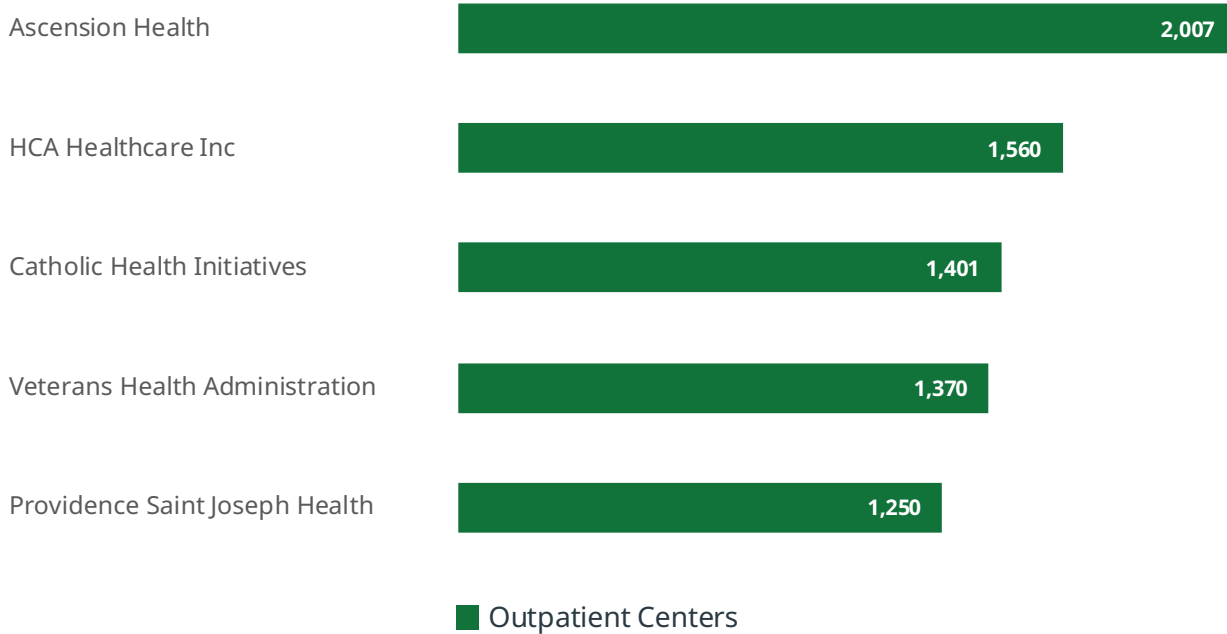


RANKED BY TOTAL NUMBER OF HOSPITALS

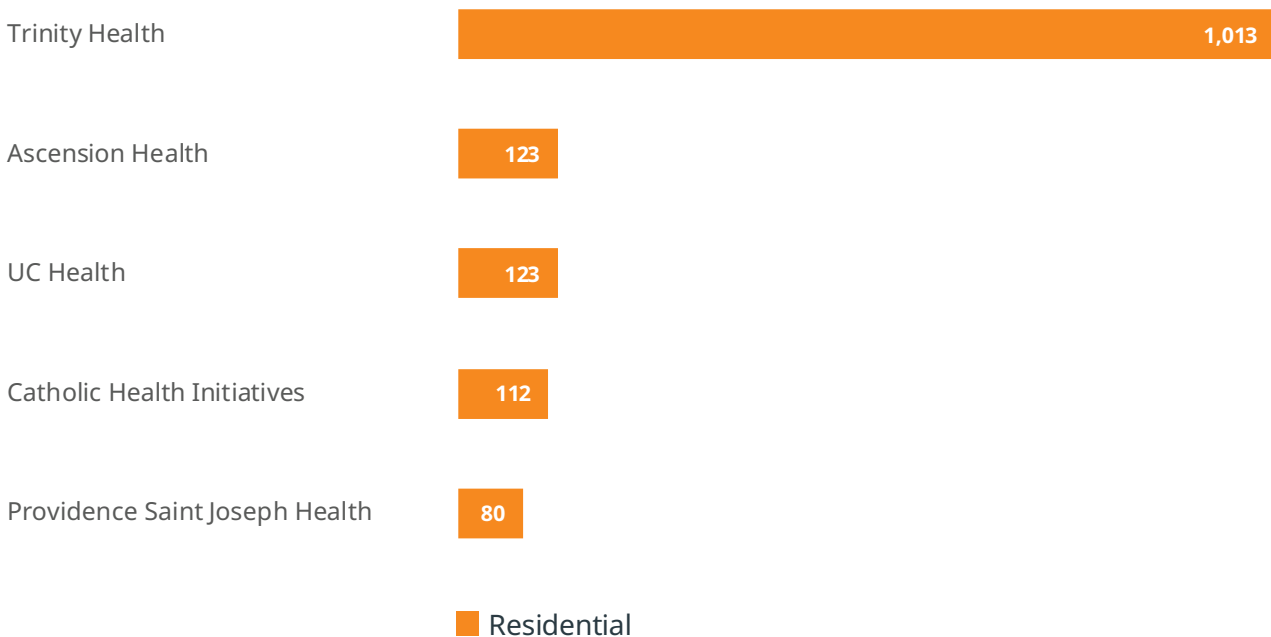


TOP 5 INTEGRATED DELIVERY NETWORKS

RANKED BY TOTAL NUMBER OF OUTPATIENT CENTERS



RANKED BY TOTAL NUMBER OF RESIDENTIAL FACILITIES



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