



April 2020

TOP 25 INTEGRATED DELIVERY NETWORKS

Market Insights Report

INTRODUCTION

Ascension Takes Top Spot in 2020 Ranking of Largest IDNs

Ascension Health of Saint Louis, Missouri, tops our list of the largest Integrated Delivery Networks (IDNs) in the U.S. With more than 2,195 facilities, this faith-based organization dominates the healthcare continuum largely through its footprint of outpatient facilities. Ascension is also a strong player in the management of hospitals and residential facilities. Ascension works with nearly 26,870 physicians.

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

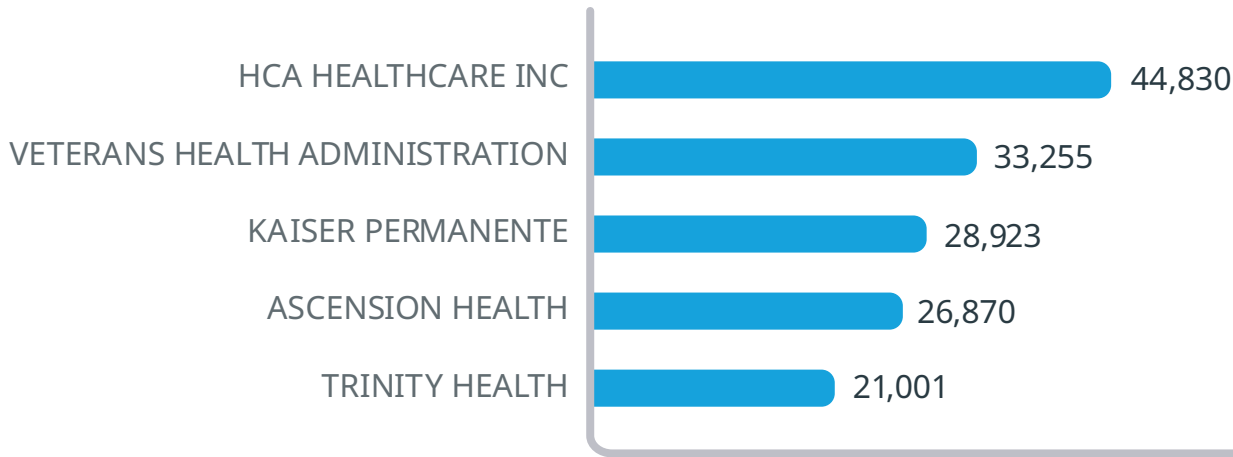
Integrated delivery networks are focused on expanding their networks and influence to meet population health management goals and objectives.

Top 25 Integrated Delivery Networks

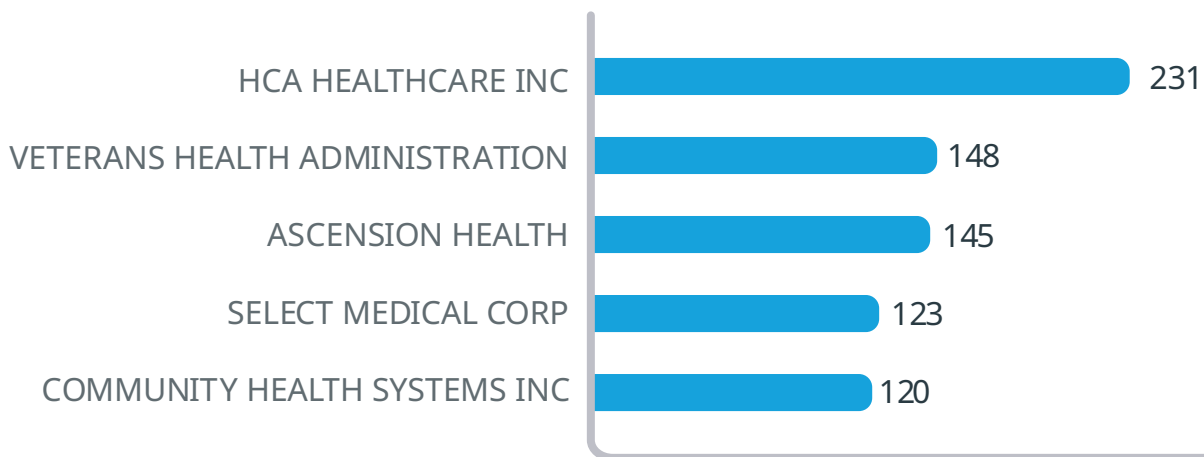
RANK	COMPANY NAME	CITY	STATE	HOSPITALS	OUTPATIENT CENTERS	RESIDENTIAL FACILITIES	TOTAL FACILITIES	PHYSICIANS
1	ASCENSION HEALTH	Saint Louis	MO	145	1,926	124	2,195	26,870
2	HCA HEALTHCARE INC	Nashville	TN	231	1,676	20	1,927	44,830
3	VETERANS HEALTH ADMINISTRATION	Washington	DC	148	1,370	87	1,605	33,255
4	SELECT MEDICAL CORP	Mechanicsburg	PA	123	1,382	1	1,506	9,865
5	TRINITY HEALTH	Livonia	MI	94	1,285	125	1,504	21,001
6	CATHOLIC HEALTH INITIATIVES	Englewood	CO	114	1,233	102	1,449	14,868
7	PROVIDENCE SAINT JOSEPH HEALTH	Renton	WA	61	1,077	74	1,212	17,384
8	COMMUNITY HEALTH SYSTEMS INC	Franklin	TN	120	1,040	35	1,195	14,716
9	UPMC	Pittsburgh	PA	44	1,019	41	1,104	9,674
10	TENET HEALTHCARE	Dallas	TX	98	971	6	1,075	20,955
11	BON SECOURS MERCY HEALTH INC	Cincinnati	OH	36	876	42	954	7,897
12	MERCY	Chesterfield	MO	43	824	14	881	4,791
13	ATRIUM HEALTH	Charlotte	NC	46	748	27	821	7,300
14	UC HEALTH	Oakland	CA	23	759	3	785	14,760
15	LIFEPOINT HEALTH	Brentwood	TN	88	645	31	764	7,692
16	SUTTER HEALTH	Sacramento	CA	33	698	28	759	10,118
17	KAISER PERMANENTE	Oakland	CA	44	661	30	735	28,923
18	NORTHWELL HEALTH	New Hyde Park	NY	25	661	20	706	12,945
19	ADVENTHEALTH	Altamonte Springs	FL	43	589	36	668	9,604
20	BAYLOR SCOTT AND WHITE HEALTH	Dallas	TX	36	573	4	613	6,058
21	NOVANT HEALTH INC	Winston Salem	NC	16	553	3	572	3,853
22	SANFORD HEALTH	Sioux Falls	SD	39	259	257	555	2,516
23	INDIAN HEALTH SERVICE	Rockville	MD	40	482	17	539	2,357
24	PARTNERS HEALTHCARE SYSTEM INC	Boston	MA	17	490	11	518	10,271
25	NEW YORK PRESBYTERIAN HEALTHCARE SYSTEM	New York	NY	12	485	5	502	8,310

Top 5 Integrated Delivery Networks

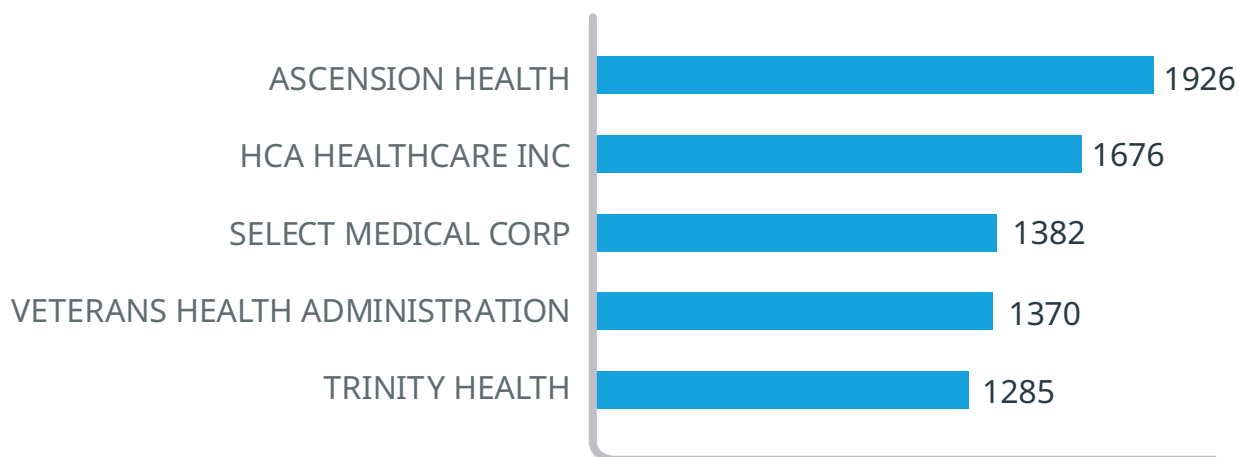
RANKED BY TOTAL NUMBER OF PHYSICIANS



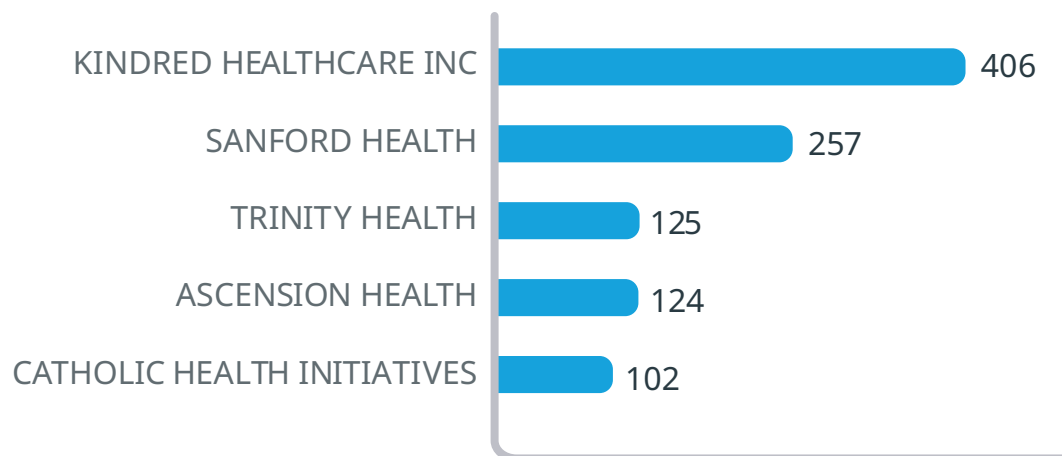
RANKED BY TOTAL NUMBER OF HOSPITALS



RANKED BY TOTAL NUMBER OF OUTPATIENT CENTERS



RANKED BY TOTAL NUMBER OF RESIDENTIAL FACILITIES



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Top 50 U.S. Medical Groups
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