



September 2021

Top 25 Integrated Delivery Networks

Market Insights Report

Introduction

Ascension Takes Top Spot in the 2021 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 2,218 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 31,980 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 can have the potential to influence physician treatment behavior by having significant control over 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 sources, industry data, and customer input, IQVIA has identified approximately 965 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

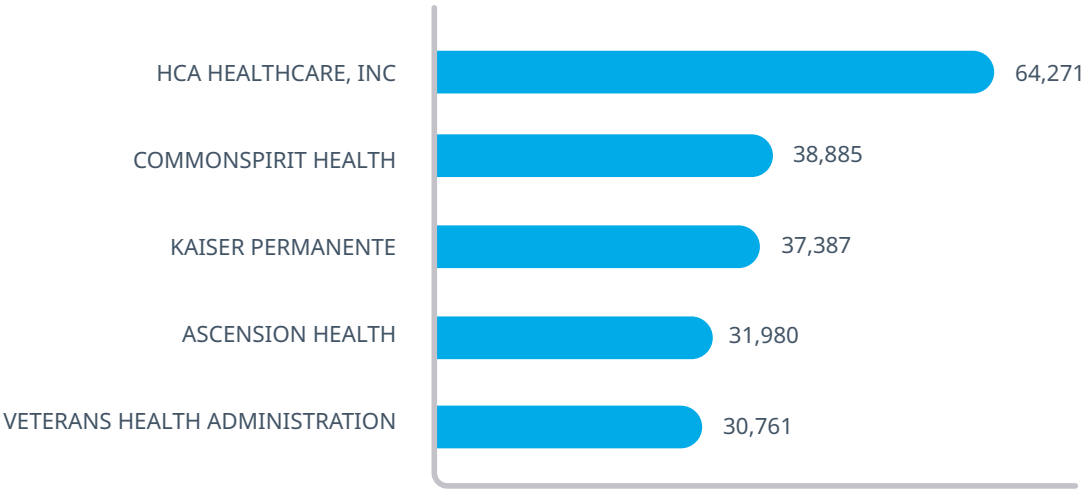
Integrated delivery networks are focused on expanding their networks and influence to meet population health management goals and objectives. This includes the influence of physician treatment behavior.

Top 25 Integrated Delivery Networks

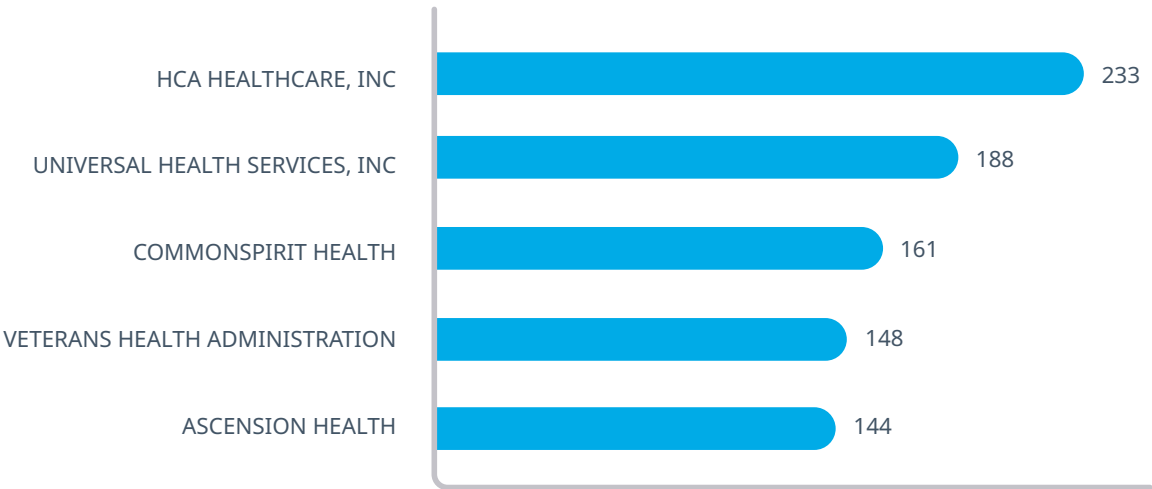
RANK	COMPANY NAME	CITY	STATE	HOSPITALS	OUTPATIENT CENTERS	RESIDENTIAL FACILITIES	TOTAL FACILITIES	PHYSICIANS
1	ASCENSION HEALTH	Saint Louis	MO	144	1,952	122	2,218	31,980
2	HCA HEALTHCARE, INC	Nashville	TN	233	1,785	16	2,034	64,271
3	COMMONSPIRIT HEALTH	Chicago	IL	161	1,467	119	1,747	38,885
4	VETERANS HEALTH ADMINISTRATION	Washington	DC	148	1,383	92	1,623	30,761
5	SELECT MEDICAL CORP	Mechanicsburg	PA	124	1,437	1	1,562	7,980
6	TRINITY HEALTH	Livonia	MI	83	1,286	118	1,487	27,788
7	PROVIDENCE	Renton	WA	63	1,140	77	1,280	20,537
8	UPMC	Pittsburgh	PA	45	1,132	51	1,228	11,325
9	COMMUNITY HEALTH SYSTEMS, INC	Franklin	TN	99	1,010	33	1,142	16,686
10	BON SECOURS MERCY HEALTH, INC	Cincinnati	OH	42	1,035	46	1,123	11,124
11	TENET HEALTHCARE	Dallas	TX	99	995	4	1,098	27,401
12	MERCY	Chesterfield	MO	43	830	13	886	5,386
13	LIFEPOINT HEALTH	Brentwood	TN	90	723	30	843	10,268
14	ADVOCATE AURORA HEALTH	Downers Grove	IL	29	742	16	787	11,024
15	SUTTER HEALTH	Sacramento	CA	33	724	28	785	12,862
16	NORTHWELL HEALTH	New Hyde Park	NY	25	726	21	772	15,160
17	KINDRED HEALTHCARE, INC	Louisville	KY	69	14	662	745	1,752
18	KAISER PERMANENTE	Oakland	CA	44	652	33	729	37,387
19	PROMEDICA	Toledo	OH	15	333	352	700	2,651
20	UNIVERSITY OF CALIFORNIA HEALTH	Oakland	CA	17	681	1	699	17,529
21	ADVENTHEALTH	Altamonte Springs	FL	42	615	36	693	11,261
22	ATRIUM HEALTH	Charlotte	NC	32	620	26	678	6,882
23	BAYLOR SCOTT AND WHITE HEALTH	Dallas	TX	36	597	5	638	8,595
24	NOVANT HEALTH, INC	Winston Salem	NC	23	603	5	631	5,695
25	MASS GENERAL BRIGHAM	Boston	MA	16	556	13	585	11,551

Top 5 Integrated Delivery Networks

TOP 5 IDN RANKED BY TOTAL PHYSICIANS (MD,DO)

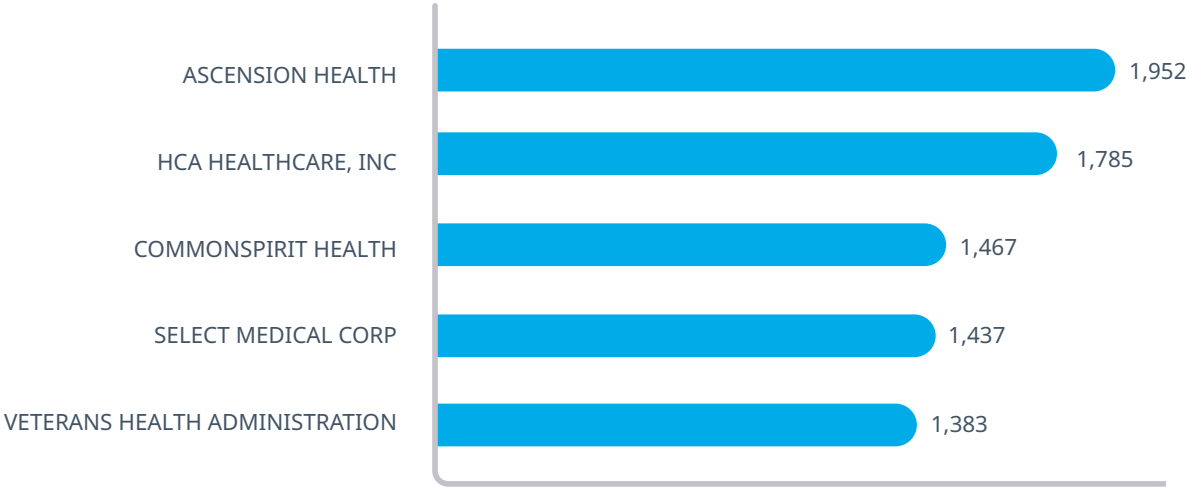


TOP 5 IDN RANKED BY TOTAL HOSPITALS (COT_CLASSIFICATION_ID = 14)

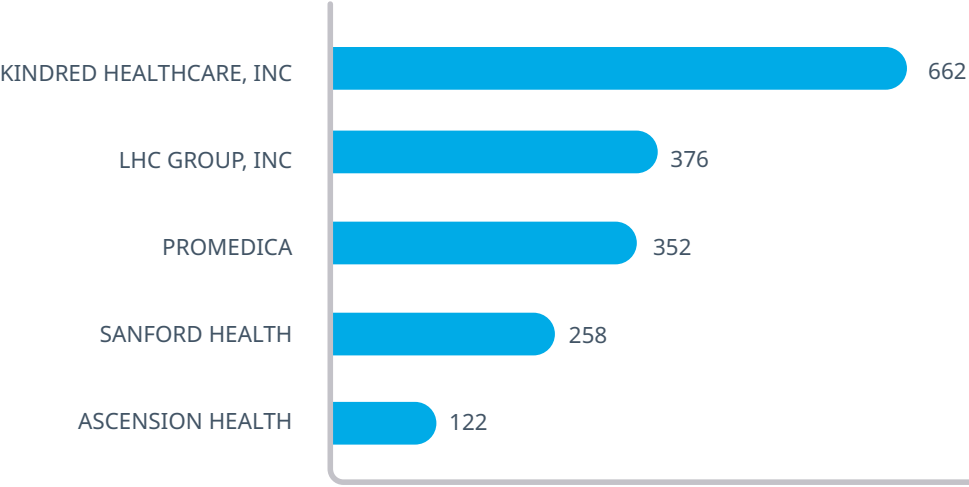


Top 5 Integrated Delivery Networks

TOP 5 IDN RANKED BY TOTAL OUTPATIENT CENTERS (COT_CLASSIFICATION_ID = 17)



TOP 5 IDN RANKED BY TOTAL RESIDENTIAL FACILITIES (COT_CLASSIFICATION_ID = 20)





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