

OCTOBER 2018

TOP 25 INTEGRATED DELIVERY NETWORKS

Market Insights Report



OVERVIEW

Ascension Takes Top Spot in 2018 Ranking of Largest Health Care Networks

For the second straight year Ascension Health tops our list of the largest Integrated Delivery Networks (IDN) in the U.S. With more than 2,100 facilities, St Louis, MO-based Ascension dominates the health care continuum largely through its expanding footprint of outpatient centers. Ascension also is a strong player in the management of hospitals and nursing homes. Ascension employs about 11 physicians per facility type.

Health care 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 purchasing authority.

Through extensive telephone interviews, website

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, the OneKey database is continuously validated by a dedicated team of data stewards to ensure the highest level of accuracy and freshness.



INFLUENCERS OF PHYSICIAN TREATMENT BEHAVIOR

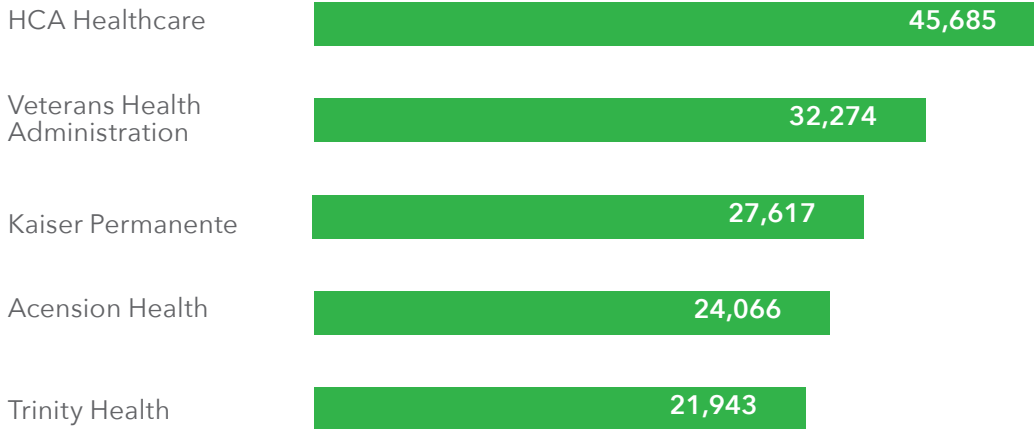
Integrated delivery networks are focused on expanding their networks and influence to meet population health management goals and objectives.

TOP 25 INTEGRATED DELIVERY NETWORKS

Rank	IDN Name	City	State	Hospitals	Outpatient Centers	Nursing/ Assisted Living	Total Facilities	Total MDs and DOs
1	ASCENSION HEALTH	Saint Louis	MO	135	1,887	94	2,116	24,066
2	HCA HEALTHCARE	Nashville	TN	223	1,576	8	1,807	45,685
3	CATHOLIC HEALTH INITIATIVES	Englewood	CO	119	1,334	107	1,560	16,101
4	VETERANS HEALTH ADMINISTRATION	Washington	DC	148	1,271	85	1,504	32,274
5	COMMUNITY HEALTH SYSTEMS INC	Franklin	TN	139	1,262	66	1,467	17,787
6	PROVIDENCE SAINT JOSEPH HEALTH	Renton	WA	64	1,270	90	1,424	18,452
7	TRINITY HEALTH	Livonia	MI	89	1,170	125	1,384	21,943
8	SELECT MEDICAL CORP	Mechanicsburg	PA	121	1,167	1	1,289	10,527
9	UPMC	Pittsburgh	PA	37	941	42	1,020	7,527
10	MERCY HEALTH	Cincinnati	OH	43	841	19	903	4,886
11	TENET HEALTHCARE CORP	Dallas	TX	83	778	11	872	19,431
12	BAYLOR SCOTT AND WHITE HEALTH	Dallas	TX	46	794	6	846	9,398
13	KAISER PERMANENTE	Oakland	CA	45	722	36	803	27,617
14	ATRIUM HEALTH	Charlotte	NC	38	734	25	797	6,446
15	SUTTER HEALTH	Sacramento	CA	34	690	29	753	9,955
16	NORTHWELL HEALTH	New Hyde Park	NY	27	643	22	692	13,493
17	UC HEALTH	Oakland	CA	17	661	3	681	13,534
18	DIGNITY HEALTH	San Francisco	CA	46	586	25	657	14,553
19	ADVENTIST HEALTH SYSTEM	Altamonte Springs	FL	41	570	37	648	9,092
20	LIFEPOINT HEALTH	Brentwood	TN	73	529	27	629	6,253
21	NOVANT HEALTH INC	Winston Salem	NC	15	536	3	554	3,716
22	INDIAN HEALTH SERVICE	Rockville	MD	41	478	18	537	2,222
23	KINDRED HEALTHCARE INC	Louisville	KY	84	16	432	532	3,839
24	PARTNERS HEALTHCARE SYSTEM INC	Boston	MA	17	466	13	496	10,339
25	ADVOCATE HEALTH CARE	Downers Grove	IL	15	464	15	494	6,200

TOP 5 INTEGRATED DELIVERY NETWORKS

RANKED BY TOTAL NUMBER OF PHYSICIANS



Total MDs and DOs

RANKED BY NUMBER OF HOSPITALS



Number of Hospitals

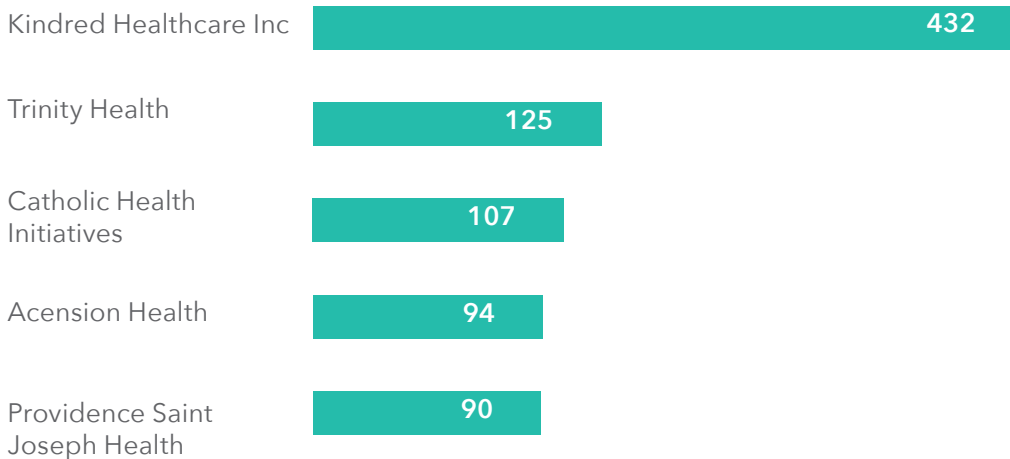
TOP 5 INTEGRATED DELIVERY NETWORKS CONT.

RANKED BY NUMBER OF OUTPATIENT CENTERS



■ Number of Outpatient Centers

RANKED BY NUMBER OF NURSING AND ASSISTED LIVING HOMES



■ Number of Nursing and Assisted Living Homes

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JACK SCHEMBER

Director, Marketing

jack.schember@iqvia.com or 949-476-2051

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