



AMERICA'S  
ESSENTIAL  
HOSPITALS

## THE FUTURE OF HOSPITALS IN AN ERA OF INNOVATION AND TUMULT

2018 Spring Outlook and Strategies Conference  
Paperboard Packaging Council

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*April 12, 2018*

# ESSENTIAL HOSPITALS

## WE ARE ESSENTIAL

Members of America's Essential Hospitals share five fundamental characteristics:



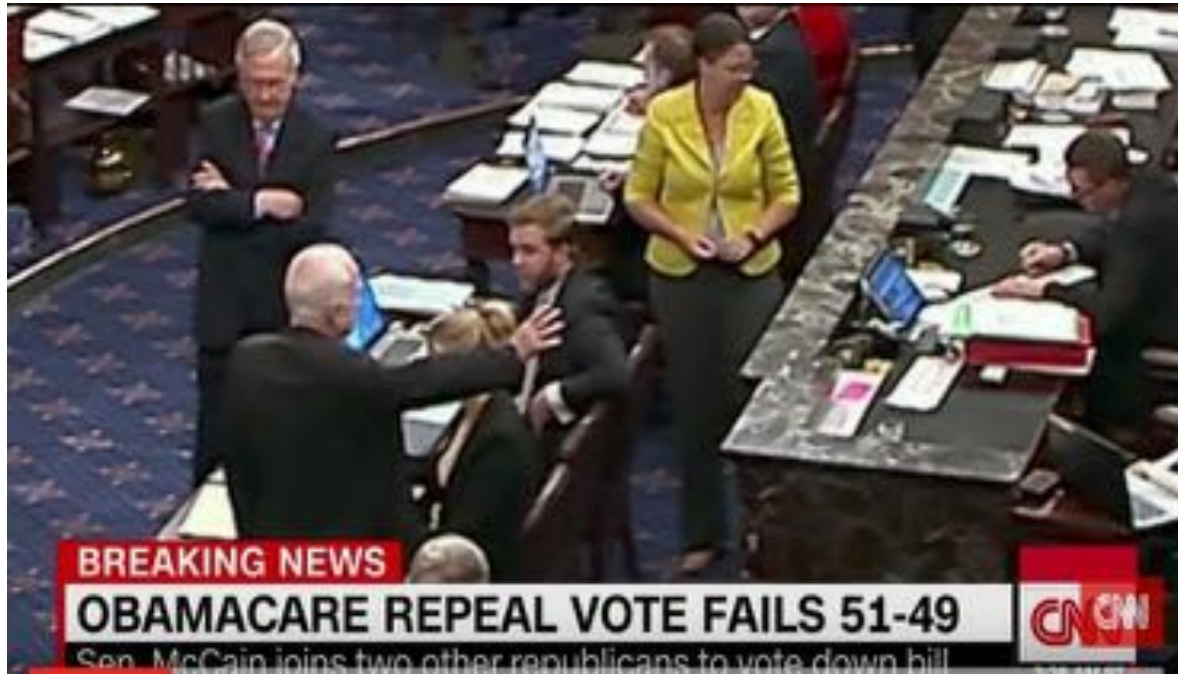
# OUR HOME





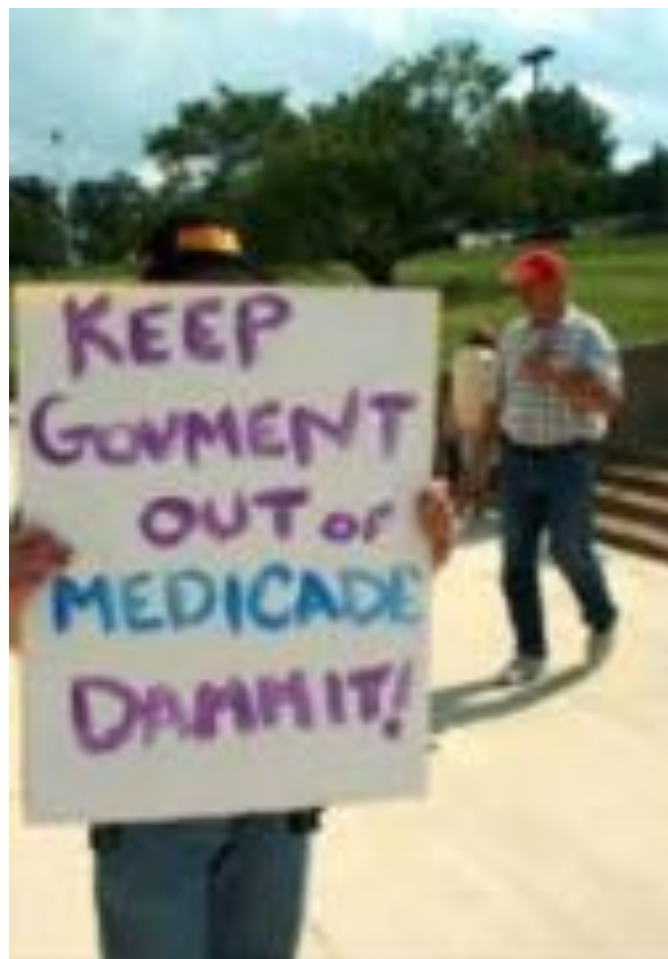
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# CURRENT EVENTS





## “MEDICADE” ARRIVES!



# NOW, ON TO 2020!





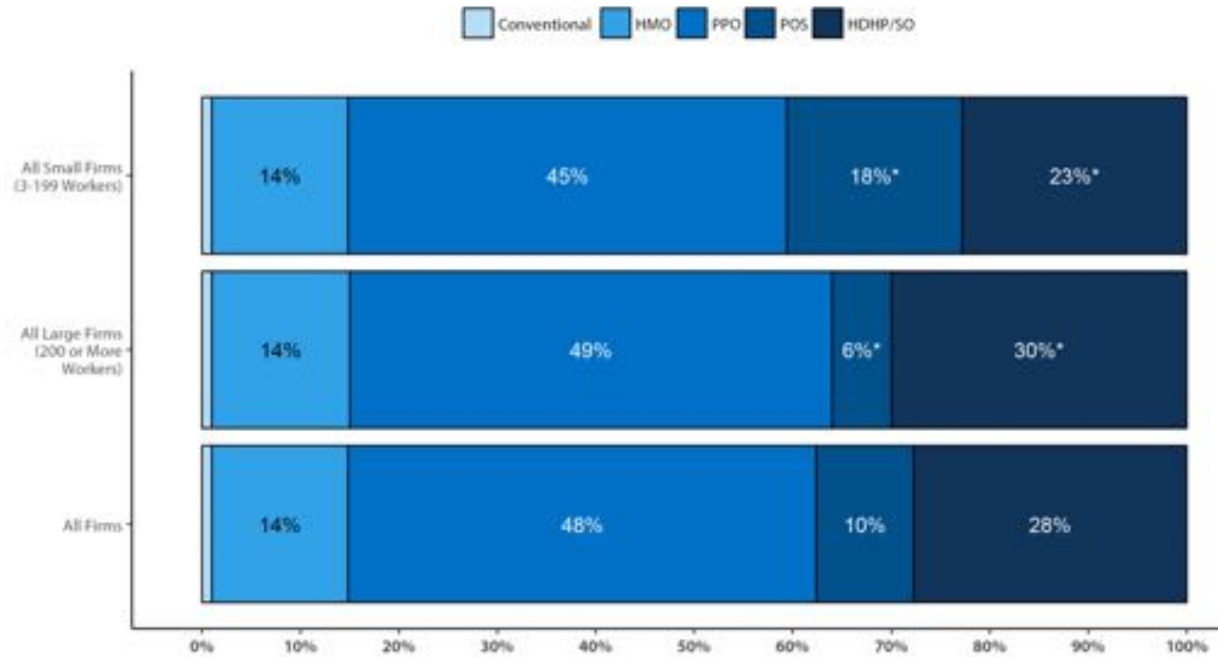
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# WHAT'S REALLY GOING ON?

## HEADS IN BEDS



**Figure D**  
**Distribution of Health Plan Enrollment for Covered Workers, by Plan Type and Firm Size, 2017**



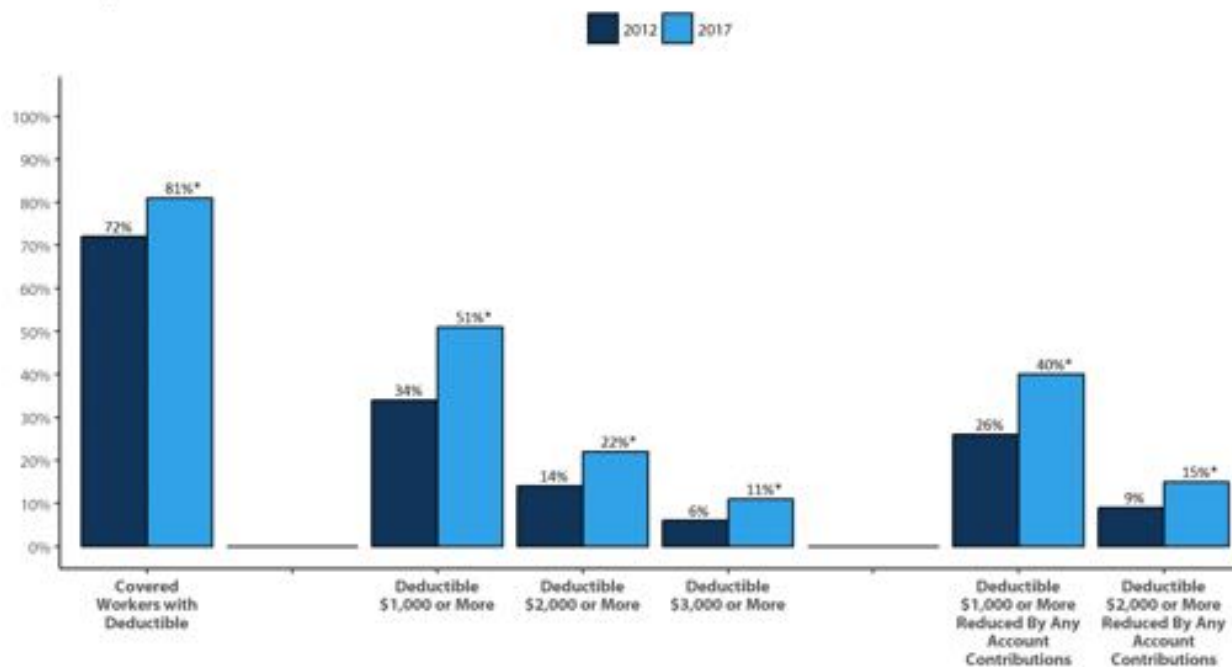
\* Enrollment in plan type is statistically different between All Small Firms and All Large Firms ( $p < .05$ ).

NOTE: HMO is health maintenance organization, PPO is preferred provider organization, POS is point-of-service plan, HDHP/SO is high-deductible health plan with a savings option, such as a health reimbursement arrangement (HRA) or a health savings account (HSA).

SOURCE: Kaiser/HRET Survey of Employer-Sponsored Health Benefits, 2017



**Figure E**  
**Percentage Of Covered Workers With Various Single Coverage General Annual Deductible Levels, 2012 and 2017**

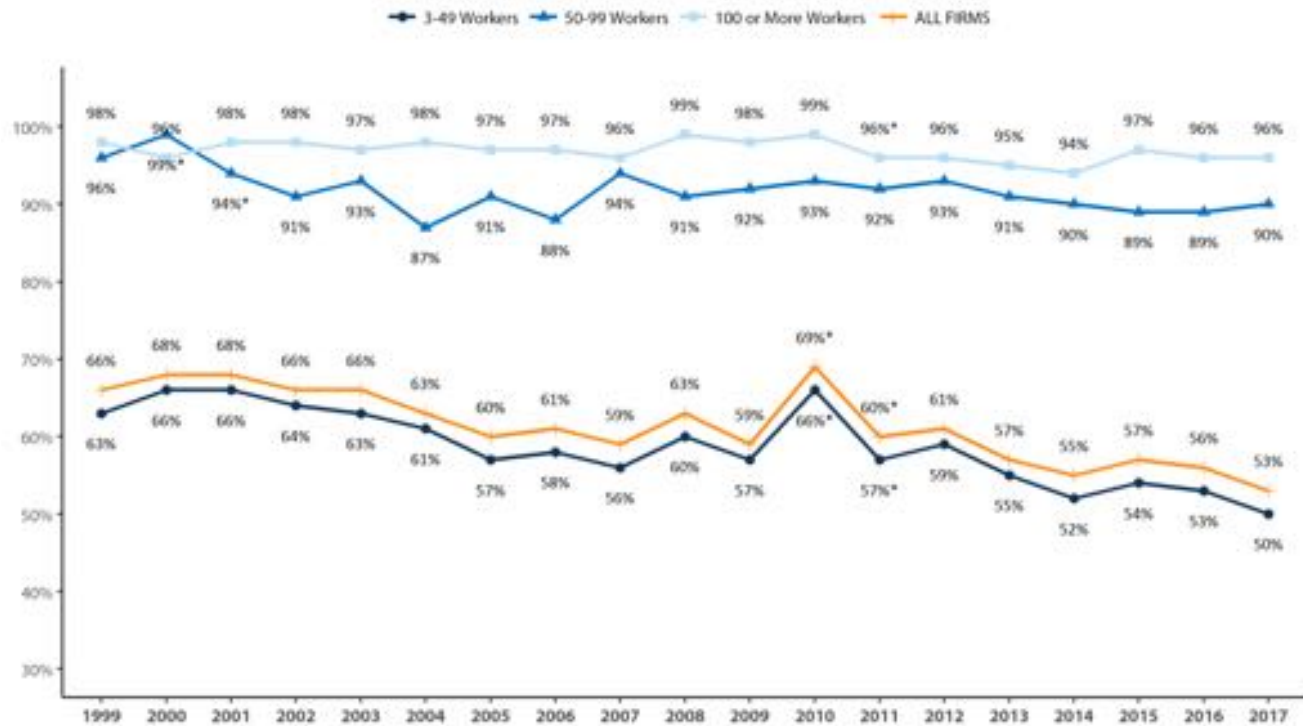


\* Estimate is statistically different from estimate for the previous year shown ( $p < .05$ ).

NOTE: These estimates include workers enrolled in HDHP/SOs and other plan types. Account contributions include an employer's contribution to an HSA or HRA. Average general annual health plan deductibles for PPOs, POS plans, and HDHP/SOs are for in-network services.

SOURCE: Kaiser/HRET Survey of Employer-Sponsored Health Benefits, 2012 and 2017

**Figure G**  
**Percentage of Firms Offering Health Benefits, by Firm Size, 1999-2017**



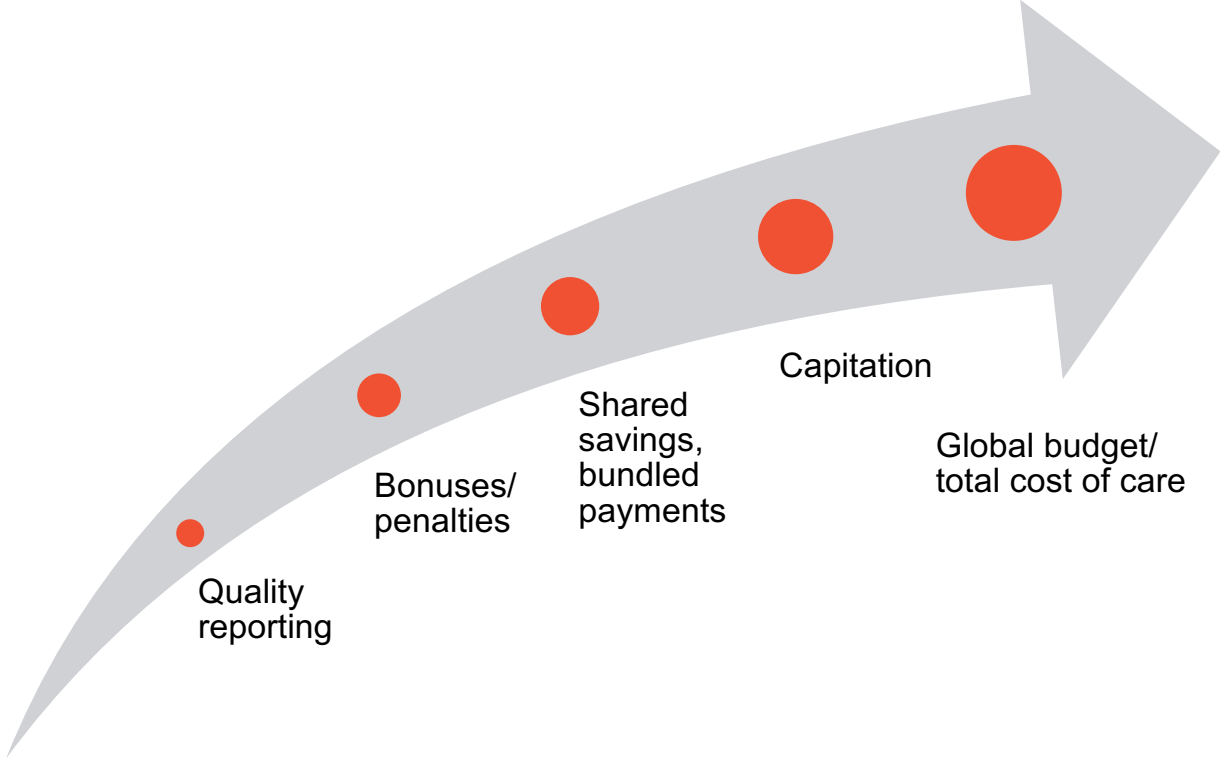
\* Estimate is statistically different from estimate for the previous year shown ( $p < .05$ ).

NOTE: As noted in the Survey Design and Methods section, estimates presented in this figure are based on the sample of both firms that completed the entire survey and those that answered just one question about whether they offer health benefits.

SOURCE: Kaiser/HRET Survey of Employer-Sponsored Health Benefits, 1999-2017



# NEW EXPECTATIONS





**NEW  
ACCOUNTABILITY**



Walmart 

Humana<sup>®</sup>

 **CVS**

**æetna**<sup>SM</sup>

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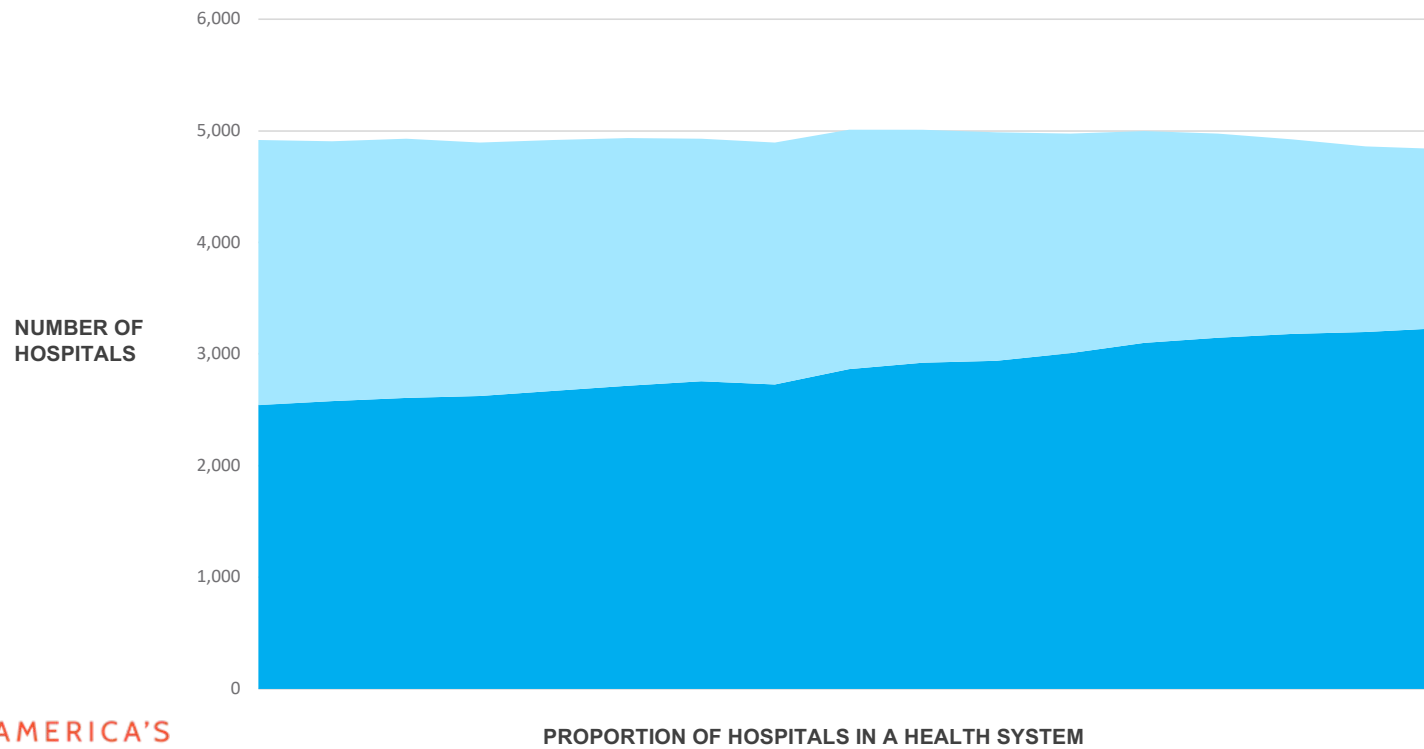


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# HOSPITALS FIGHT BACK

# HOSPITAL CONSOLIDATION

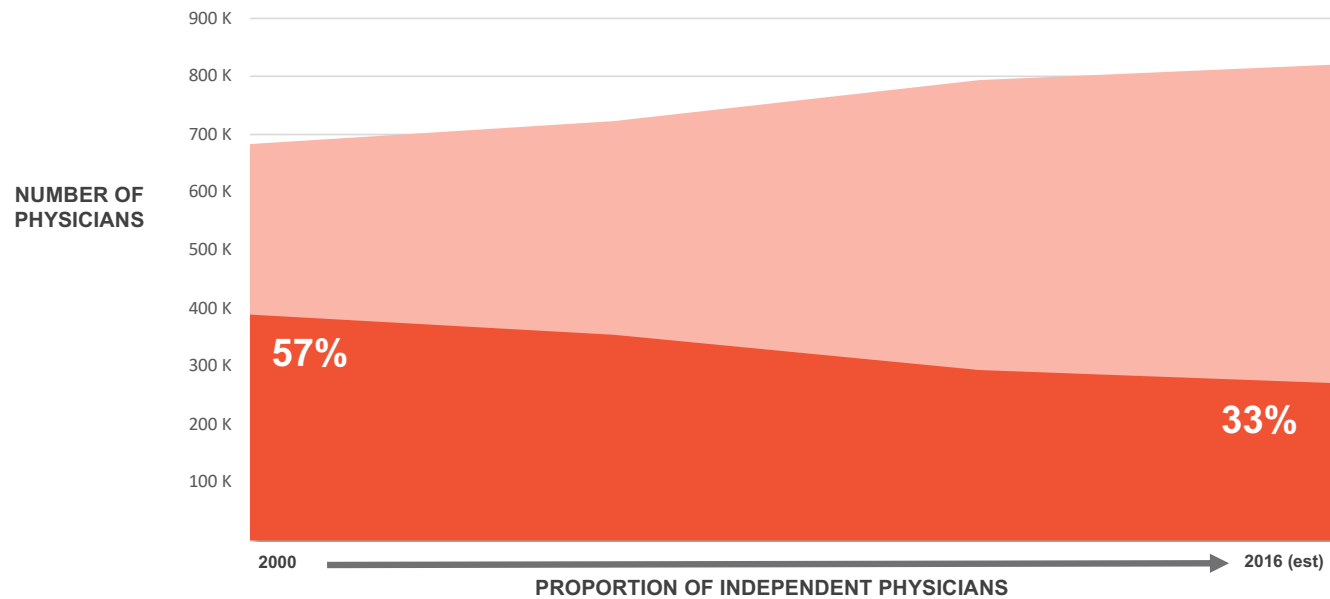
Number of Independent Hospitals in the U.S. (2000 – 2016)\*



Source: Analysis of American Hospital Association Annual Survey data, 2000 – 2016  
\* Includes Registered Community Hospitals. For more information visit: <https://www.aha.org/statistics/fast-facts-us-hospitals>

# PHYSICIAN CONSOLIDATION

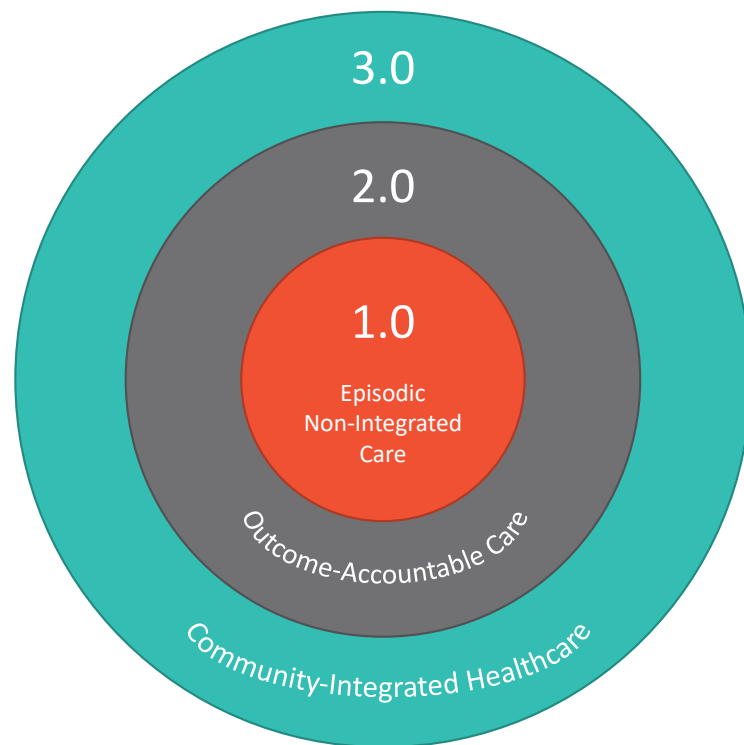
Number of Independent Practicing Physicians in the U.S. (2000 - 2016)



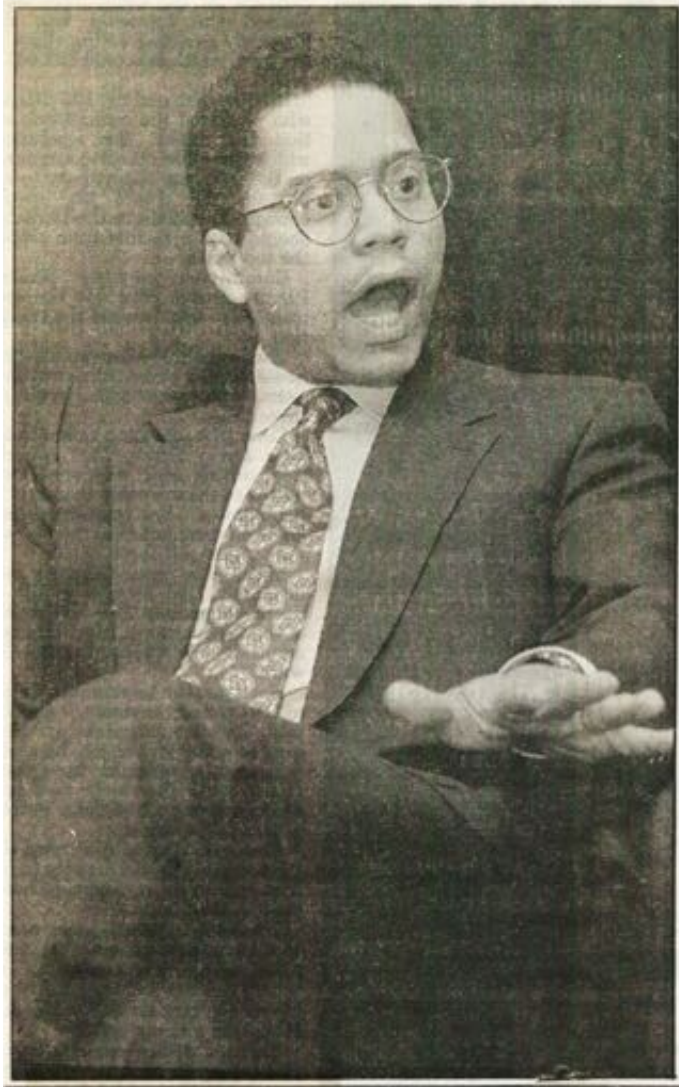
Source: Accenture. *The (Independent) Doctor Will NOT See You Now*. 2015. [https://www.accenture.com/\\_acnmedia/PDF-2/Accenture-The-Doctor-Will-Not-See-You.pdf](https://www.accenture.com/_acnmedia/PDF-2/Accenture-The-Doctor-Will-Not-See-You.pdf). Accessed June 2016.



# POPULATION HEALTH: GAME CHANGER?







# BEYOND THE WALLS: Bon Secours Baltimore

## Gibbons Commons

- Low-income housing
- Recreational facilities
- Healthy food markets
- Education and employment opportunities

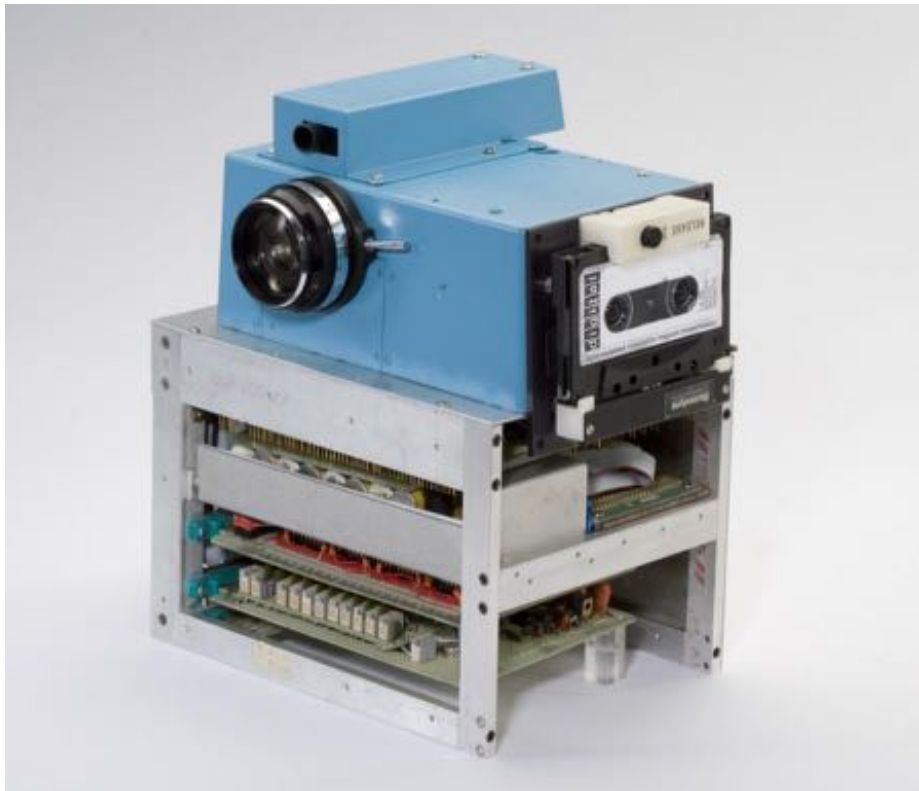


# HEALTH IN ALL THINGS: Kaiser Permanente



Open Source, Total Health Partnership, Kaiser Permanente, 2011.



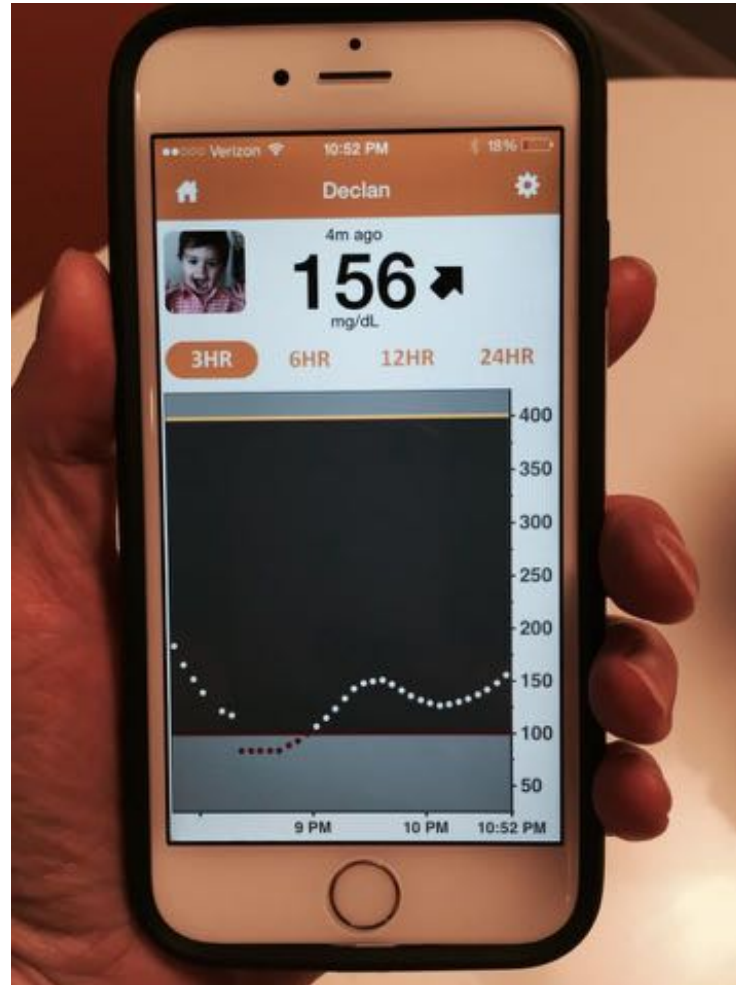


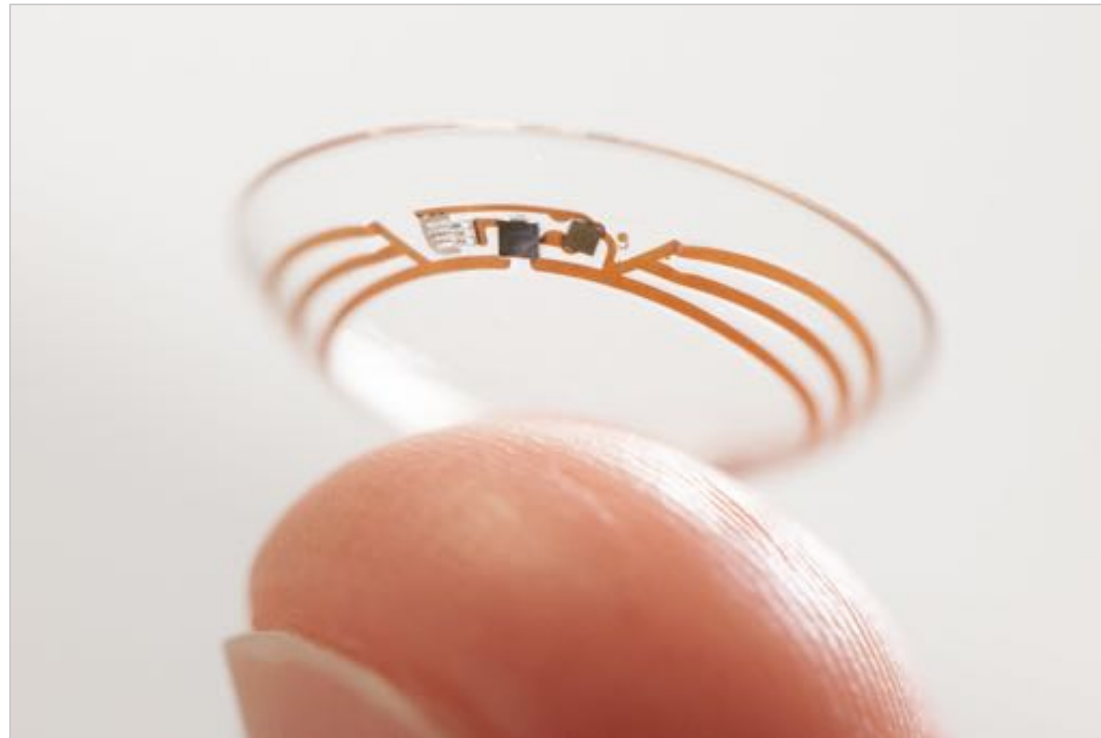


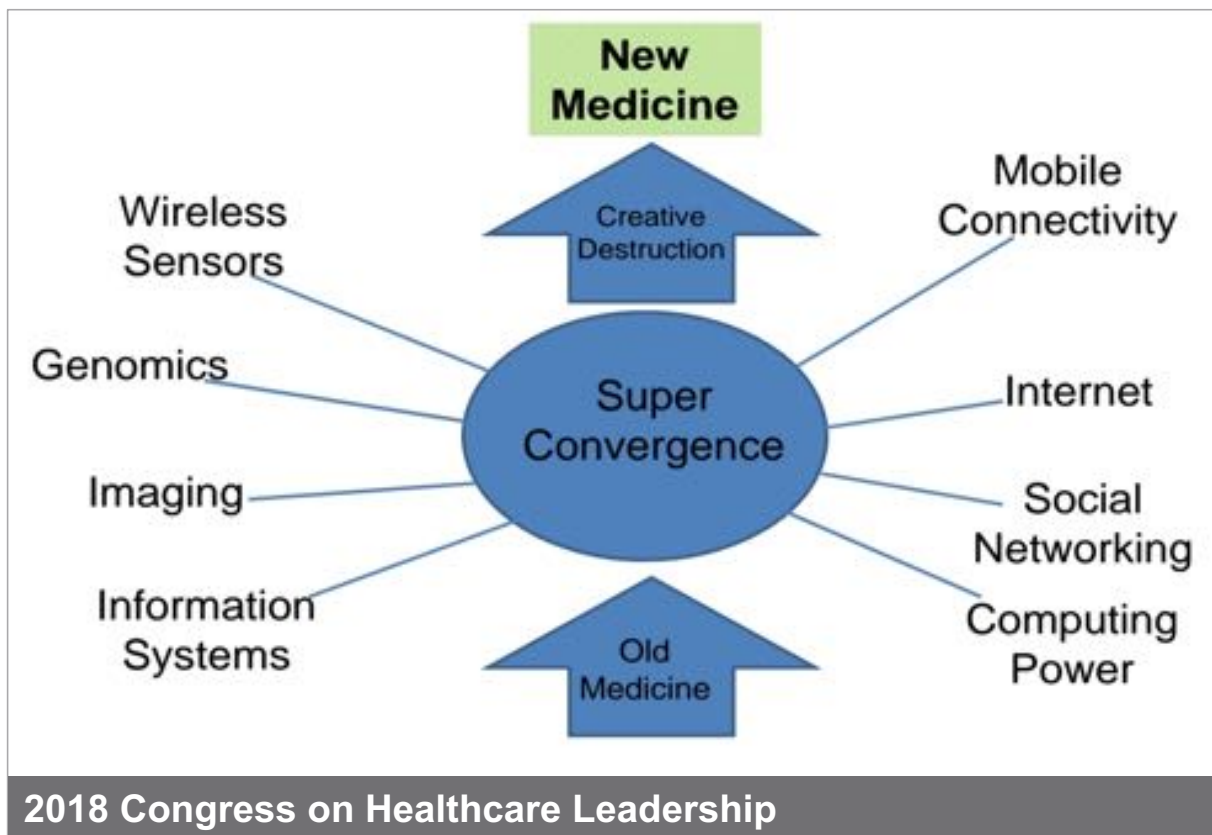
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# DISRUPTERS















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# FINAL EXAM

## TWO THINGS BRIAN TOLD ME TO DO

If you only remember two things from my presentation, they should be...

- The old paradigm of doctors and hospitals is changing.
- Technology WILL change health care ... but the future is far from clear.

When you get back to your office, the two things you should do are...

- Ask my local hospital(s): What are you doing to improve the health of my community?
- Renew my PPC membership/pay my dues!





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**THANKS!**  
**[essentialhospitals.org](https://essentialhospitals.org)**