# TABLE OF CONTENTS

**CHAPTER 1.0: Trends in the Overall Health Care Market**

- **Chart 1.1:** Total National Health Expenditures, 1980 – 2010
- **Chart 1.2:** Percent Change in Total National Health Expenditures, 1990 – 2010
- **Chart 1.3:** Per Capita National Health Expenditures, 1980 – 2010
- **Chart 1.4:** National Health Expenditures as a Percentage of Gross Domestic Product, 1990 – 2010
- **Chart 1.5:** National Expenditures for Health Services and Supplies by Category, 1980 and 2010
- **Chart 1.6:** Percent Change in National Expenditures for Health Services and Supplies by Category, 2009 – 2010
- **Chart 1.7:** Percent Change in National Expenditures for Selected Health Services and Supplies, 2000 – 2010
- **Chart 1.8:** National Health Expenditures, 1980 – 2020
- **Chart 1.9:** Consumer Out-of-pocket Payments for National Health Expenditures, 1990 – 2010
- **Chart 1.10:** Total Prescription Drug Spending, 1980 – 2010
- **Chart 1.11:** Growth in Total Prescription Drug Spending as a Percentage of Total Growth in National Health Expenditures, 1990 – 2010
- **Chart 1.12:** Consumer Out-of-pocket Spending vs. Private Health Insurance Spending for Prescription Drugs, 1990 – 2010
- **Chart 1.13:** Distribution of National Health Expenditures by Source of Payment, 1980, 2000, and 2010
- **Chart 1.14:** Distribution of Health Insurance Coverage, Percentage of Population Covered by Payer, 1990, 2009, and 2010
- **Chart 1.15:** Number and Percent Uninsured, 1990 – 2010
TABLE OF CONTENTS

CHAPTER 1.0: Trends in the Overall Health Care Market

Chart 1.16: Average Percent Uninsured by State, 2008 – 2010
Chart 1.19: National CHIP Enrollment, FY 1999 – FY 2010
Chart 1.20: Percent Change in CHIP Enrollment By State, FY 2009 – FY 2010
Chart 1.22: Distribution of Employer-sponsored Health Insurance Enrollment by Type of Plan, 1988 – 2011
Chart 1.23: Percentage of Medicare Beneficiaries Enrolled in Medicare Managed Care, 1991 – 2011
Chart 1.24: Percent Growth in Medicare Spending per Beneficiary vs. Private Health Insurance Spending per Enrollee, 1990 – 2010
Chart 1.25: Percentage of Medicaid Beneficiaries Enrolled in Medicaid Managed Care, 1992 – 2010
Chart 1.26: Percentage of Medicaid Beneficiaries Enrolled in Medicaid Managed Care by State, 2010
Chart 1.27: Annual Change in Health Insurance Premiums, 2000 – 2011
Chart 1.28: Managed Care Plan Median Operating Margins, 1997 – 2011
Chart 1.29: Operating Margins of the Top Insurers, 2009 – 2011
Chart 1.1: Total National Health Expenditures, 1980 – 2010(1)


(1) CMS completed a benchmark revision in 2009, introducing changes in methods, definitions and source data that are applied to the entire time series (back to 1960). For more information on this revision, see http://www.cms.gov/nationalhealthexpenddata/downloads/benchmark2009.pdf.

(2) Expressed in 1980 dollars; adjusted using the overall Consumer Price Index for Urban Consumers.
Chart 1.2: Percent Change in Total National Health Expenditures, 1990 – 2010


CMS completed a benchmark revision in 2009, introducing changes in methods, definitions and source data that are applied to the entire time series (back to 1960). For more information on this revision, see http://www.cms.gov/nationalhealthexpenddata/downloads/benchmark2009.pdf.
Chart 1.3: Per Capita National Health Expenditures, 1980 – 2010


(1) CMS completed a benchmark revision in 2009, introducing changes in methods, definitions and source data that are applied to the entire time series (back to 1960). For more information on this revision, see http://www.cms.gov/nationalhealthexpenddata/downloads/benchmark2009.pdf.

(2) Expressed in 1980 dollars; adjusted using the overall Consumer Price Index for Urban Consumers.
Chart 1.4: National Health Expenditures as a Percentage of Gross Domestic Product, 1990 – 2010(1)


(1) CMS completed a benchmark revision in 2009, introducing changes in methods, definitions and source data that are applied to the entire time series (back to 1960). For more information on this revision, see http://www.cms.gov/nationalhealthexpenddata/downloads/benchmark2009.pdf.
Chart 1.5: National Expenditures for Health Services and Supplies\(^{(1)}\) by Category, 1980 and 2010\(^{(2)}\)

- **Hospital Care**, 42.6%
- **Physician Services**, 20.2%
- **Other Professional\(^{(4)}\)**, 7.2%
- **Home Health Care**, 1.0%
- **Prescription Drugs**, 5.1%
- **Other Medical Durables and Non-durables**, 5.9%
- **Nursing Home Care**, 6.5%
- **Other\(^{(3)}\)**, 11.5%

1980:
- $235.7B

2010:
- $2,444.6B


\(^{(1)}\) Excludes medical research and medical facilities construction.


\(^{(3)}\) “Other” includes net cost of insurance and administration, government public health activities, and other personal health care.

\(^{(4)}\) “Other professional” includes dental and other non-physician professional services.
Chart 1.6: Percent Change in National Expenditures for Health Services and Supplies\(^{(1)}\) by Category, 2009 – 2010\(^{(2)}\)


\(^{(1)}\) Excludes medical research and medical facilities construction.

\(^{(2)}\) CMS completed a benchmark revision in 2009, introducing changes in methods, definitions and source data that are applied to the entire time series (back to 1960). For more information on this revision, see http://www.cms.gov/nationalhealthexpenddata/downloads/benchmark2009.pdf.

\(^{(3)}\) “Other” includes government public health activities and other personal health care.

\(^{(4)}\) “Other professional” includes dental and other non-physician professional services.
Chart 1.7: Percent Change in National Expenditures for Selected Health Services and Supplies, 2000 – 2010 (1)


---

CMS completed a benchmark revision in 2009, introducing changes in methods, definitions and source data that are applied to the entire time series (back to 1960). For more information on this revision, see http://www.cms.gov/nationalhealthexpenddata/downloads/benchmark2009.pdf.
Chart 1.8: National Health Expenditures,\(^{(1)}\) 1980 – 2021\(^{(2)}\)

Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released June 2012.

\(^{(1)}\) Years 2011 – 2021 are projections.

\(^{(2)}\) CMS completed a benchmark revision in 2009, introducing changes in methods, definitions and source data that are applied to the entire time series (back to 1960). For more information on this revision, see http://www.cms.gov/nationalhealthexpenddata/downloads/benchmark2009.pdf.


(1) CMS completed a benchmark revision in 2009, introducing changes in methods, definitions and source data that are applied to the entire time series (back to 1960). For more information on this revision, see http://www.cms.gov/nationalhealthexpenddata/downloads/benchmark2009.pdf.
Chart 1.10: Total Prescription Drug Spending, 1980 – 2010


(1) CMS completed a benchmark revision in 2009, introducing changes in methods, definitions and source data that are applied to the entire time series (back to 1960). For more information on this revision, see http://www.cms.gov/nationalhealthexpenddata/downloads/benchmark2009.pdf.

(2) Expressed in 1980 dollars; adjusted using the overall Consumer Price Index for All Urban Consumers.
Chart 1.11: Growth in Total Prescription Drug Spending as a Percentage of Total Growth in National Health Expenditures, 1990 – 2010


(1) CMS completed a benchmark revision in 2009, introducing changes in methods, definitions and source data that are applied to the entire time series (back to 1960). For more information on this revision, see http://www.cms.gov/nationalhealthexpenddata/downloads/benchmark2009.pdf.
Chart 1.12: Consumer Out-of-pocket Spending vs. Private Health Insurance Spending for Prescription Drugs, 1990 – 2010


(1) CMS completed a benchmark revision in 2009, introducing changes in methods, definitions and source data that are applied to the entire time series (back to 1960). For more information on this revision, see http://www.cms.gov/nationalhealthexpenddata/downloads/benchmark2009.pdf.
Chart 1.13: Distribution of National Health Expenditures by Source of Payment, 1980, 2000, and 2010\(^{(1)}\)

<table>
<thead>
<tr>
<th>Year</th>
<th>Medicare</th>
<th>Other Private</th>
<th>Private Insurance</th>
<th>Other Government</th>
<th>Total Medicaid</th>
<th>Out-of-pocket</th>
</tr>
</thead>
<tbody>
<tr>
<td>1980</td>
<td>14.6%</td>
<td>7.9%</td>
<td>27.0%</td>
<td>17.5%</td>
<td>10.2%</td>
<td>22.8%</td>
</tr>
<tr>
<td>2000</td>
<td>16.3%</td>
<td>6.3%</td>
<td>33.4%</td>
<td>14.5%</td>
<td>14.8%</td>
<td>14.7%</td>
</tr>
<tr>
<td>2010</td>
<td>20.2%</td>
<td>5.7%</td>
<td>32.7%</td>
<td>13.8%</td>
<td>16.0%</td>
<td>11.6%</td>
</tr>
</tbody>
</table>


\(^{(1)}\) CMS completed a benchmark revision in 2009, introducing changes in methods, definitions and source data that are applied to the entire time series (back to 1960). For more information on this revision, see http://www.cms.gov/nationalhealthexpenddata/downloads/benchmark2009.pdf.

Chart 1.15: Number and Percent Uninsured, 1990 – 2010

Chart 1.16: Average Percent Uninsured by State, 2008 – 2010

Chart 1.17: Medicare Enrollees,\(^{(1)}\) 1991 – 2011


\(^{(1)}\) Hospital insurance (Part A) enrollees and/or Supplementary Medical Insurance (Part B) enrollees; includes all persons (aged and disabled).


\(^{(1)}\) Does not include CHIP Enrollees.
Chart 1.19: National CHIP Enrollment,\(^{(1, 2)}\) FY 1999 – FY 2010


\(^{(1)}\) Number of children enrolled at any point in the year.

\(^{(2)}\) 2009 figure reflects revised data released by Centers for Medicare & Medicaid Services on February 1, 2011.
Chart 1.20: Percent Change in CHIP Enrollment by State, FY 2009 – FY 2010

RI 19%
DE 2%
DC -13%

(1) 2009 figure reflects revised data released by Centers for Medicare & Medicaid Services on February 1, 2011.


(1) Conventional plans refer to traditional indemnity plans.
(2) Point-of-service plans not separately identified in 1988.
(3) In 2006, the survey began asking about HDHP/SO, high deductible health plans with a savings option.
Chart 1.22: Distribution of Employer-sponsored Health Insurance Enrollment by Type of Plan, 1988 – 2011


(1) Conventional plans refer to traditional indemnity plans.
(2) Point-of-service plans not separately identified in 1988.
(3) In 2006, the survey began asking about HDHP/SO, high deductible health plans with a savings option.
Chart 1.23: Percentage of Medicare Beneficiaries Enrolled in Medicare Managed Care, 1991 – 2011

Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Email correspondence with CMS staff in January 2012.
Chart 1.24: Percent Growth in Medicare Spending per Beneficiary vs. Private Health Insurance Spending per Enrollee, 1990 – 2010\(^{(1,2)}\)


\(^{(1)}\) CMS completed a benchmark revision in 2009, introducing changes in methods, definitions and source data that are applied to the entire time series (back to 1960). For more information on this revision, see http://www.cms.hhs.gov/NationalHealthExpendData/downloads/tables.pdf.

\(^{(2)}\) Data reflects spending on benefits commonly covered by Medicare and Private Health Insurance.
Chart 1.25: Percentage of Medicaid Beneficiaries Enrolled in Medicaid Managed Care, 1992 – 2010

Chart 1.26: Percentage of Medicaid Beneficiaries Enrolled in Medicaid Managed Care by State, 2010

Chart 1.27: Annual Change in Health Insurance Premiums, 2000 – 2011

Chart 1.28: Managed Care Plan Median Operating Margins,\(^{(1)}\) 1997 – 2011

Source: Company documents of publicly traded managed care plans.

\(^{(1)}\) Represents earnings before interest and taxes over net revenues for the total service lines of the 11 largest publicly traded managed care plans.
Chart 1.29: Operating Margins of the Top Insurers, 2009 – 2011

Source: FactSet Research Systems Inc. Data for all years updated as of March 2012. Data from Hoovers used in 2011 and earlier years’ Chartbooks.