



# TRENDWATCH CHARTBOOK 2012

Trends Affecting Hospitals and Health Systems



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American Hospital  
Association

# TRENDWATCH CHARTBOOK 2012

Trends Affecting Hospitals and Health Systems

2012

Prepared by Avalere Health  
for the American Hospital Association

TrendWatch, produced by the American Hospital Association, highlights important trends in the hospital and health care field. Avalere Health supplies research and analytic support. TrendWatch products include a series of reports, released each year, that provide up-to-date information on health and hospital trends, and this Chartbook.

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The American Hospital Association (AHA) is the national organization that represents and serves all types of hospitals, health care networks, and their patients and communities. Close to 5,000 institutional, 600 associate, and 40,000 personal members come together to form the AHA.

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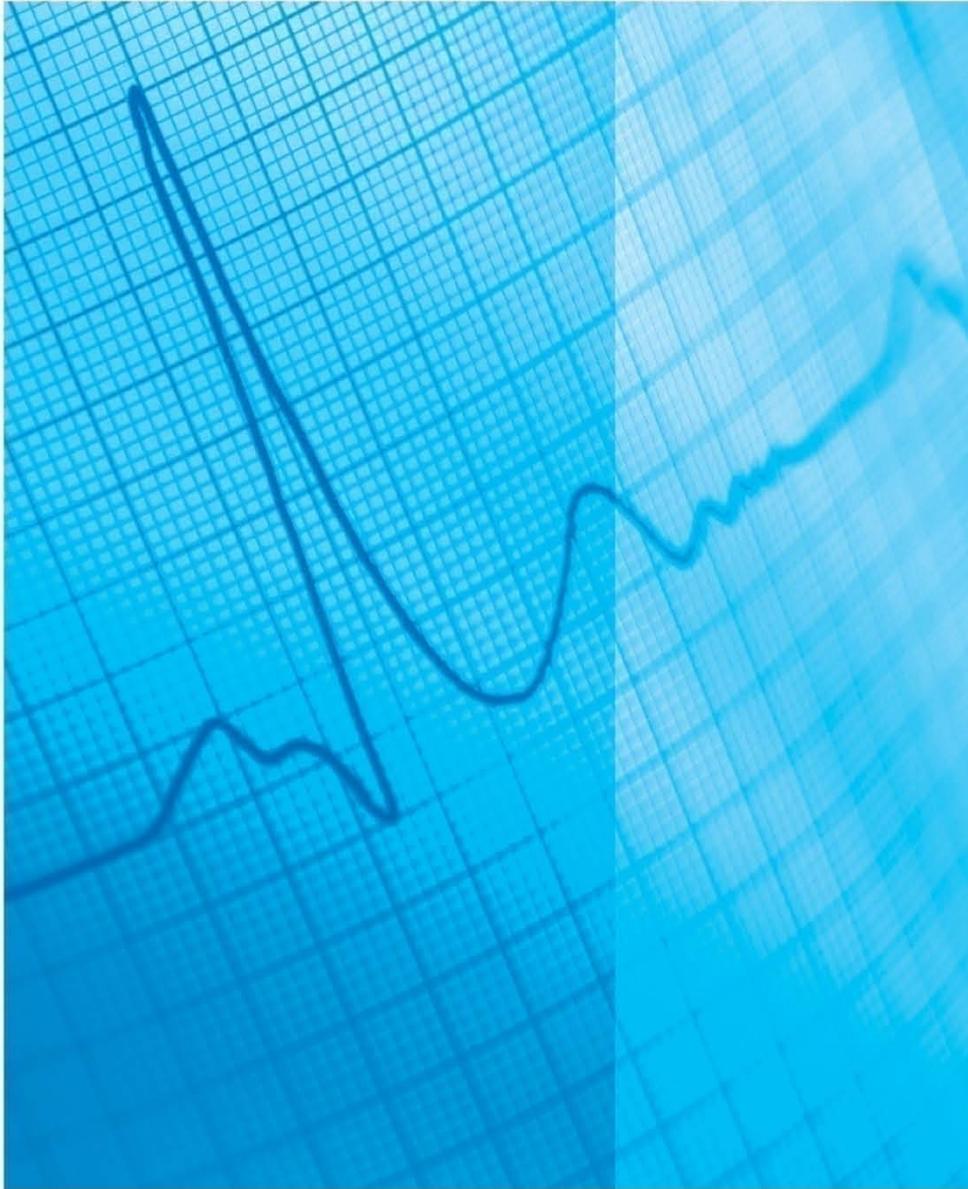


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# CHAPTER 1

Trends in the Overall  
Health Care Market

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

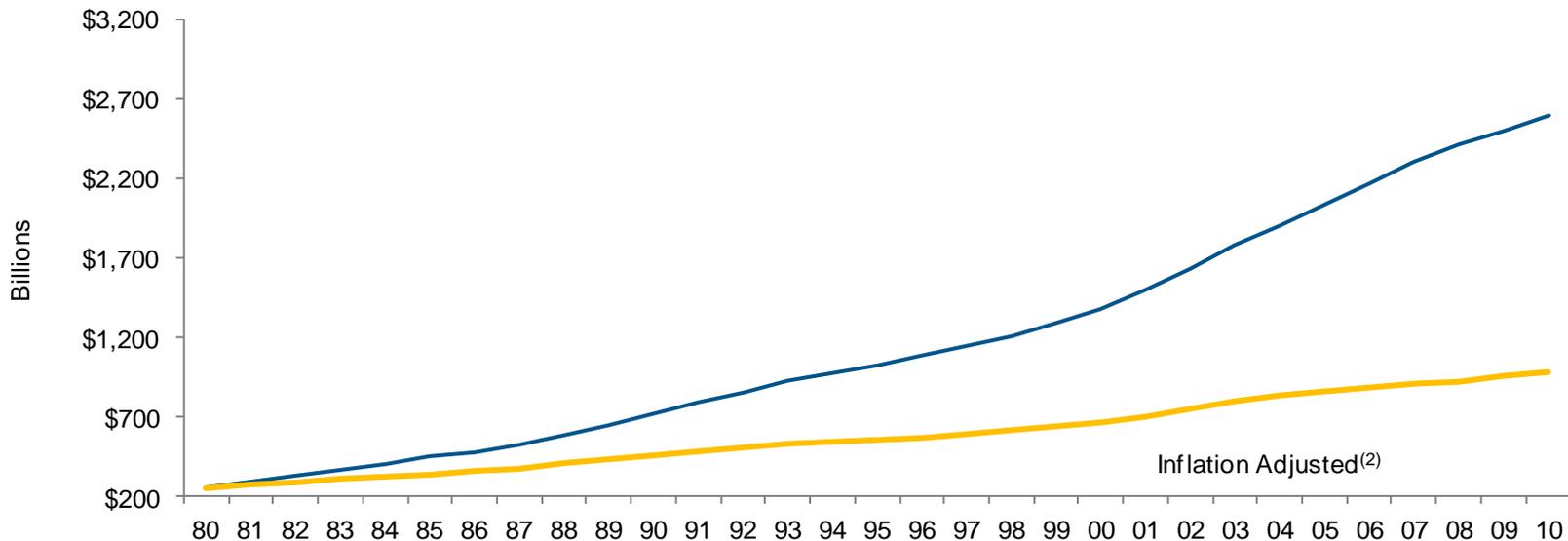
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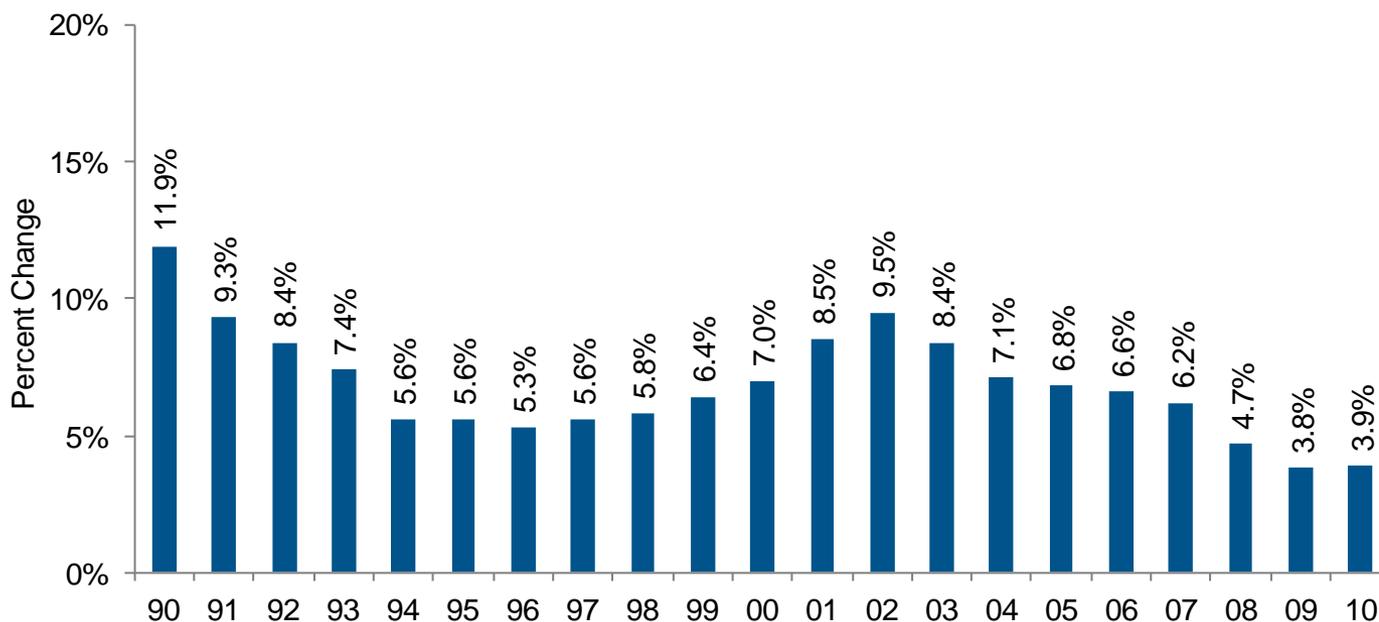


Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released January 9, 2012.

<sup>(1)</sup> 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>.

<sup>(2)</sup> Expressed in 1980 dollars; adjusted using the overall Consumer Price Index for Urban Consumers.

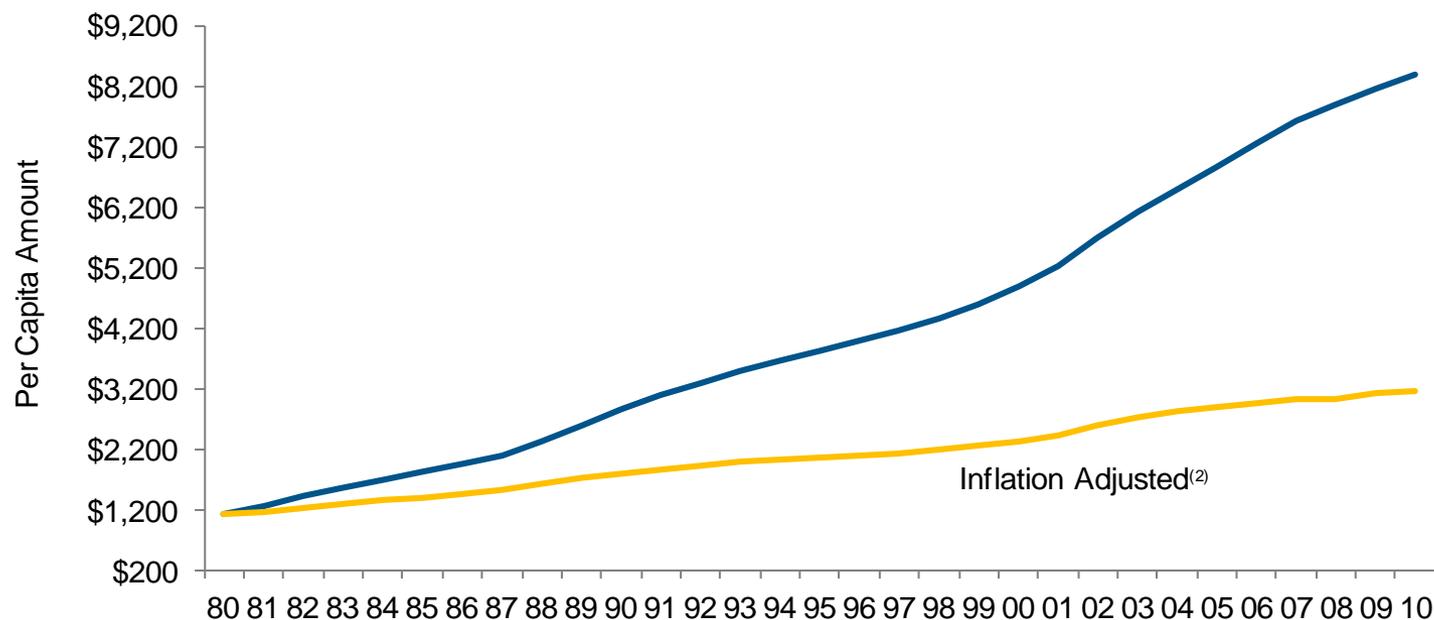
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Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released January 9, 2012.

<sup>(1)</sup> 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>.

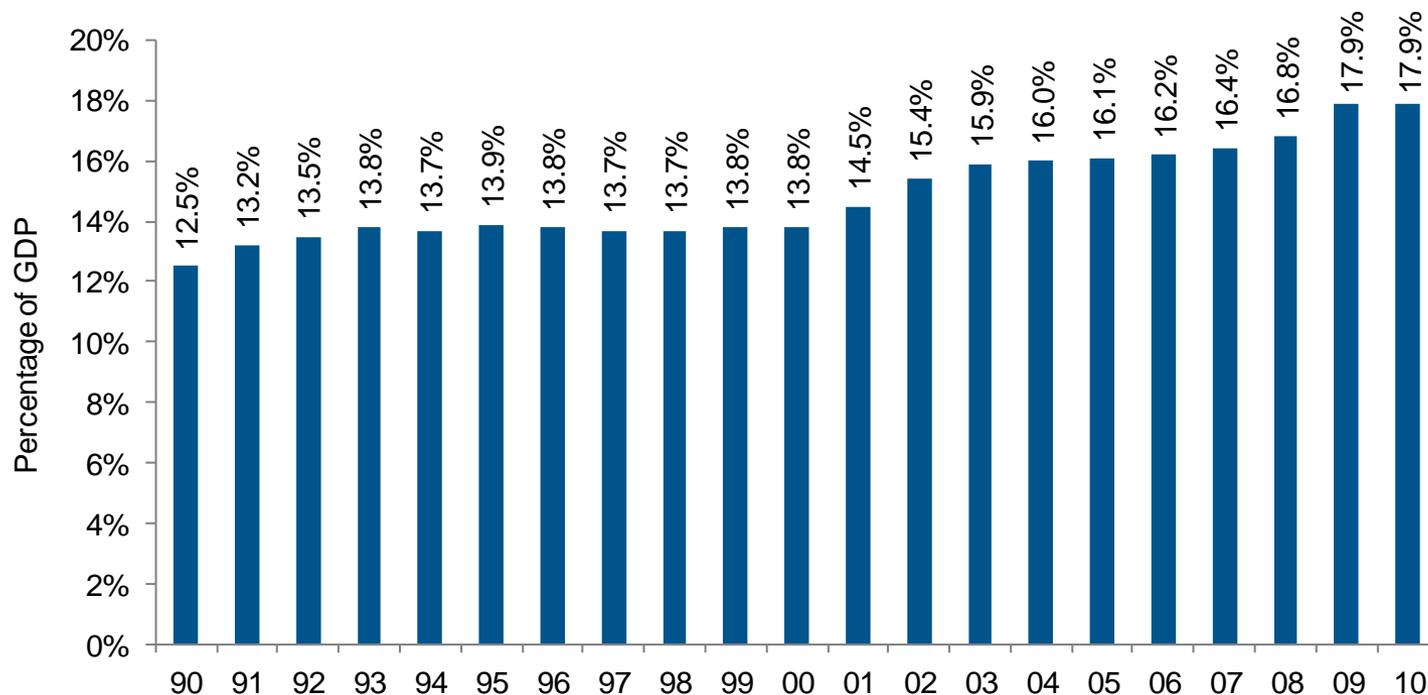
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Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released January 9, 2012.

- (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.

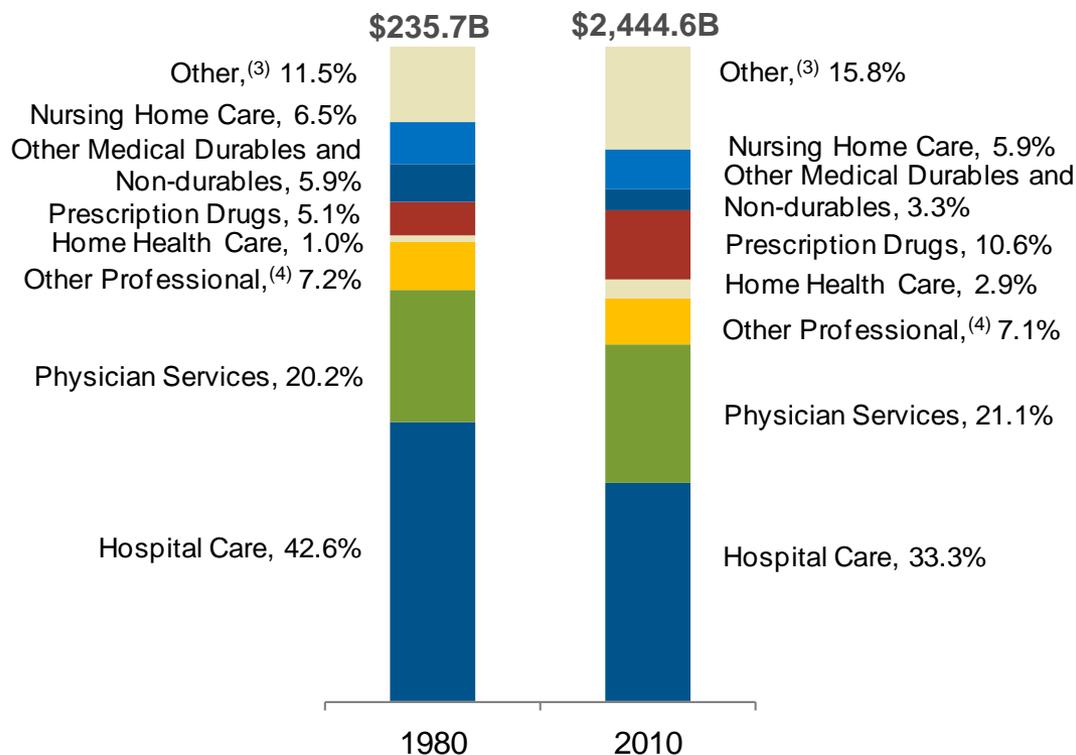
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Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released January 9, 2012.

<sup>(1)</sup> 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>.

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Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released January 9, 2012.

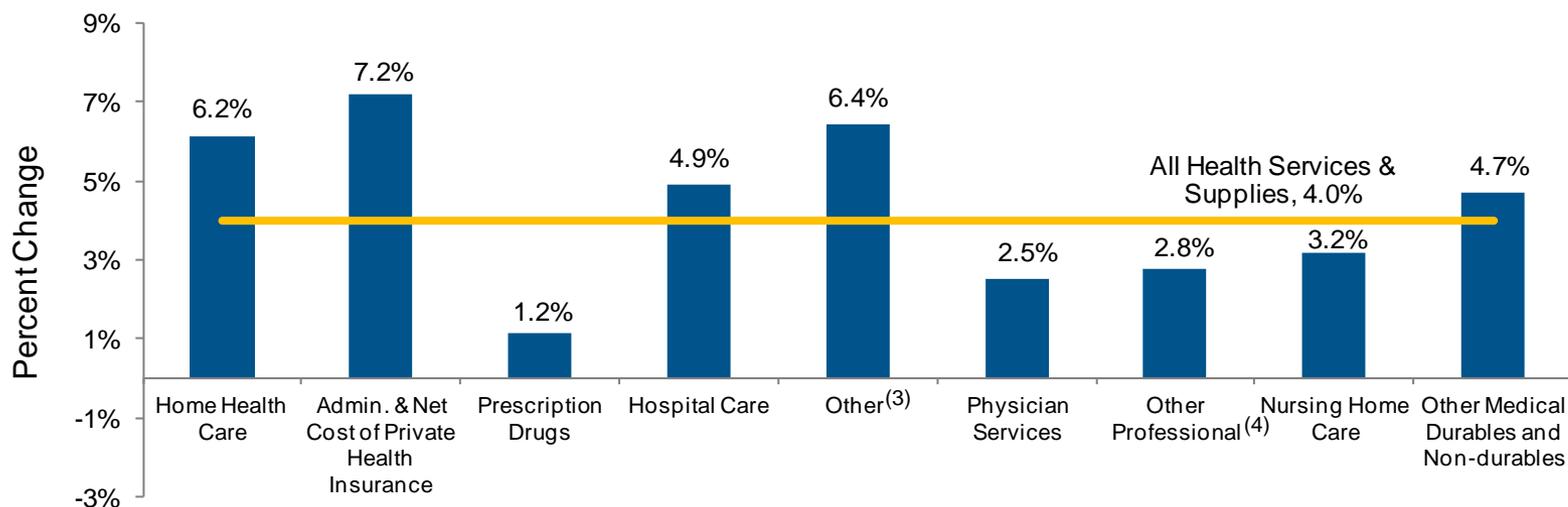
<sup>(1)</sup> Excludes medical research and medical facilities construction.

<sup>(2)</sup> 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>.

<sup>(3)</sup> "Other" includes net cost of insurance and administration, government public health activities, and other personal health care.

<sup>(4)</sup> "Other professional" includes dental and other non-physician professional services.

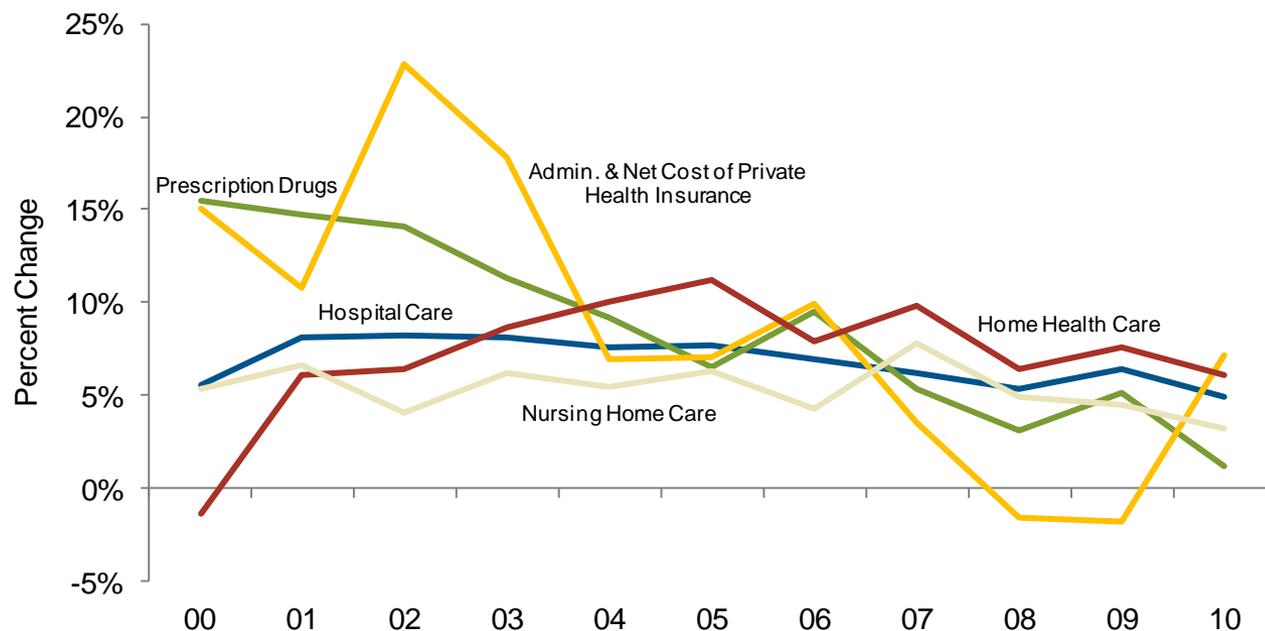
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Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released January 9, 2012.

- (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.

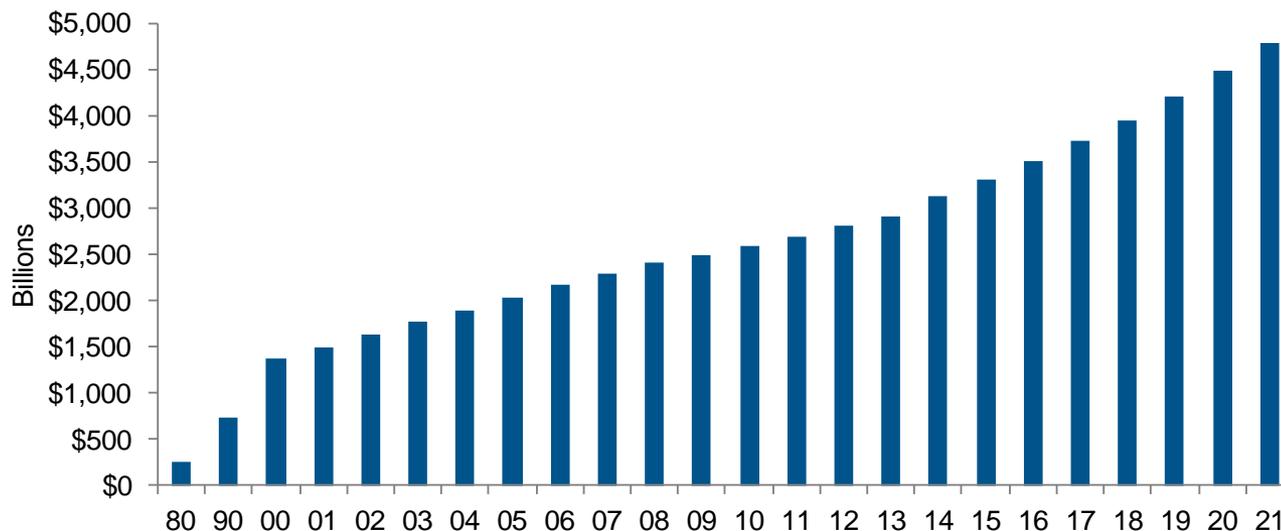
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Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released January 9, 2012.

<sup>(1)</sup> 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>.

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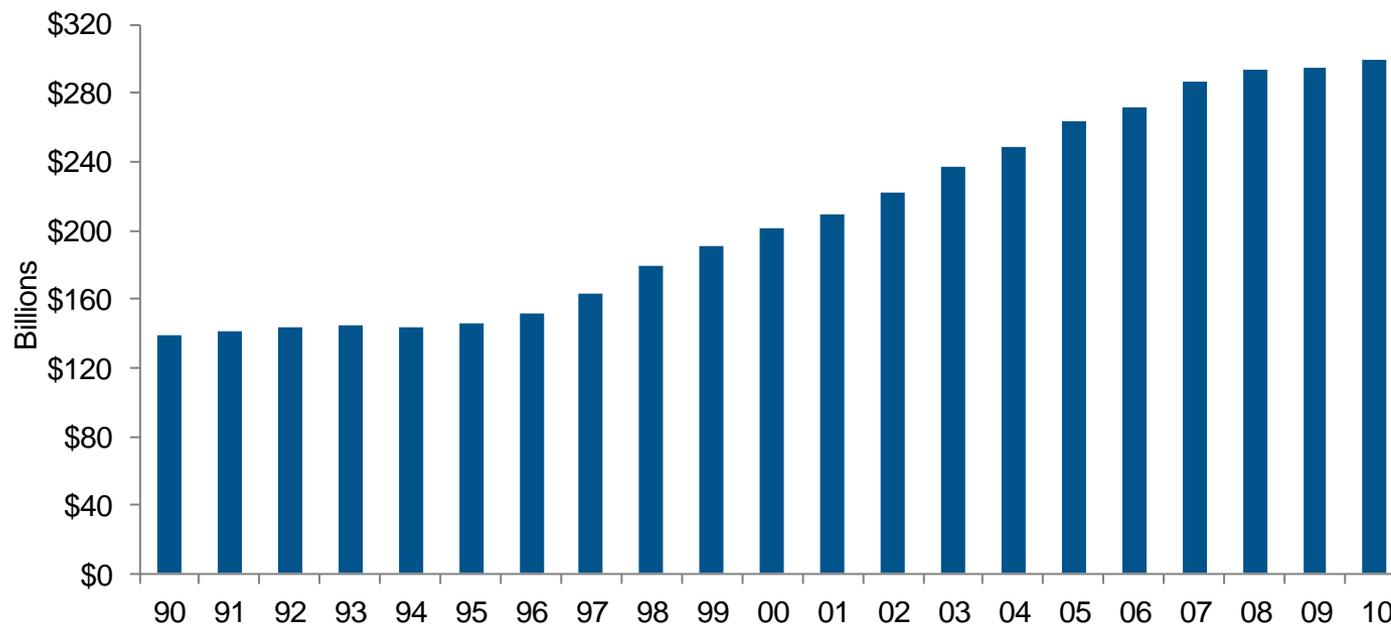


Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released June 2012.

(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>.

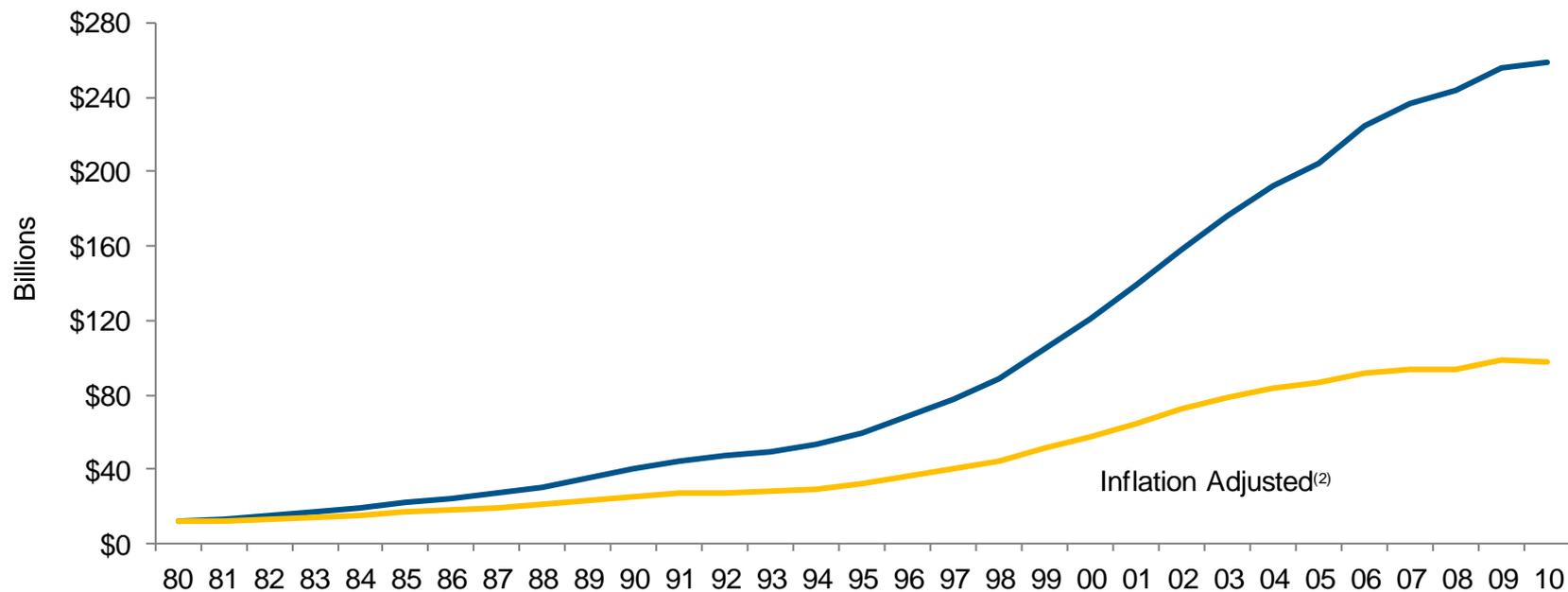
### Chart 1.9: Consumer Out-of-pocket Payments for National Health Expenditures, 1990 – 2010<sup>(1)</sup>



Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released January 9, 2012.

<sup>(1)</sup> 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<sup>(1)</sup>

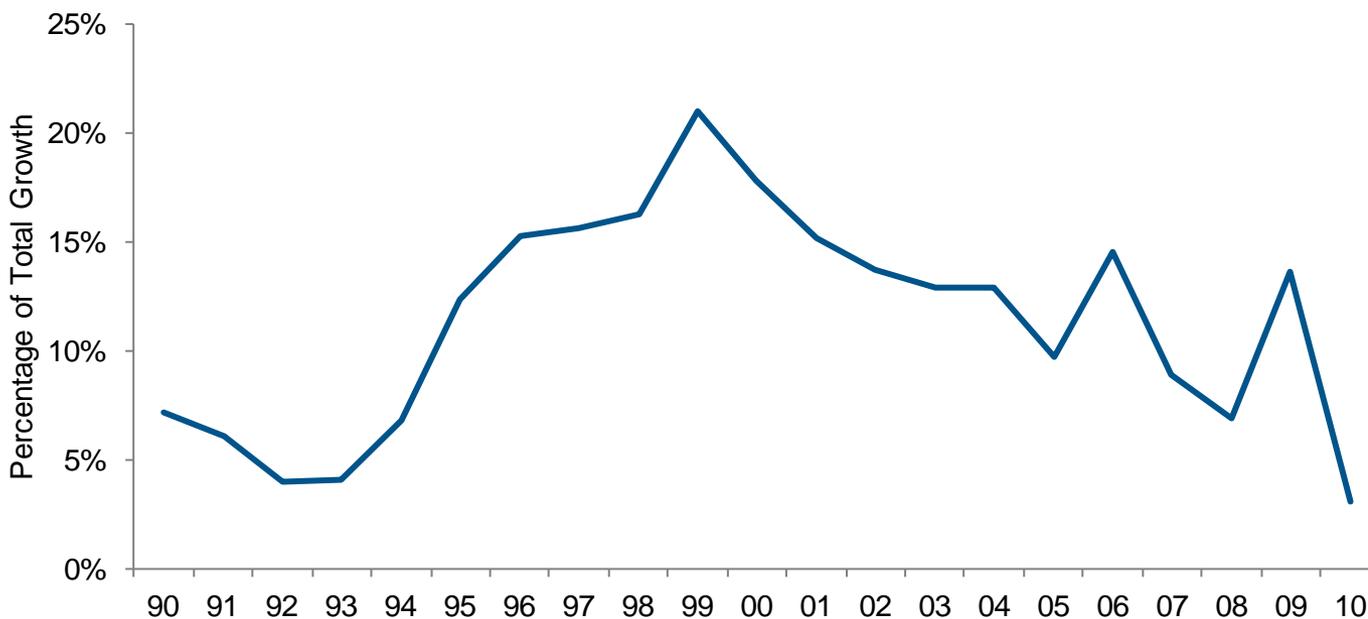


Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released January 9, 2012.

<sup>(1)</sup> 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>.

<sup>(2)</sup> Expressed in 1980 dollars; adjusted using the overall Consumer Price Index for All Urban Consumers.

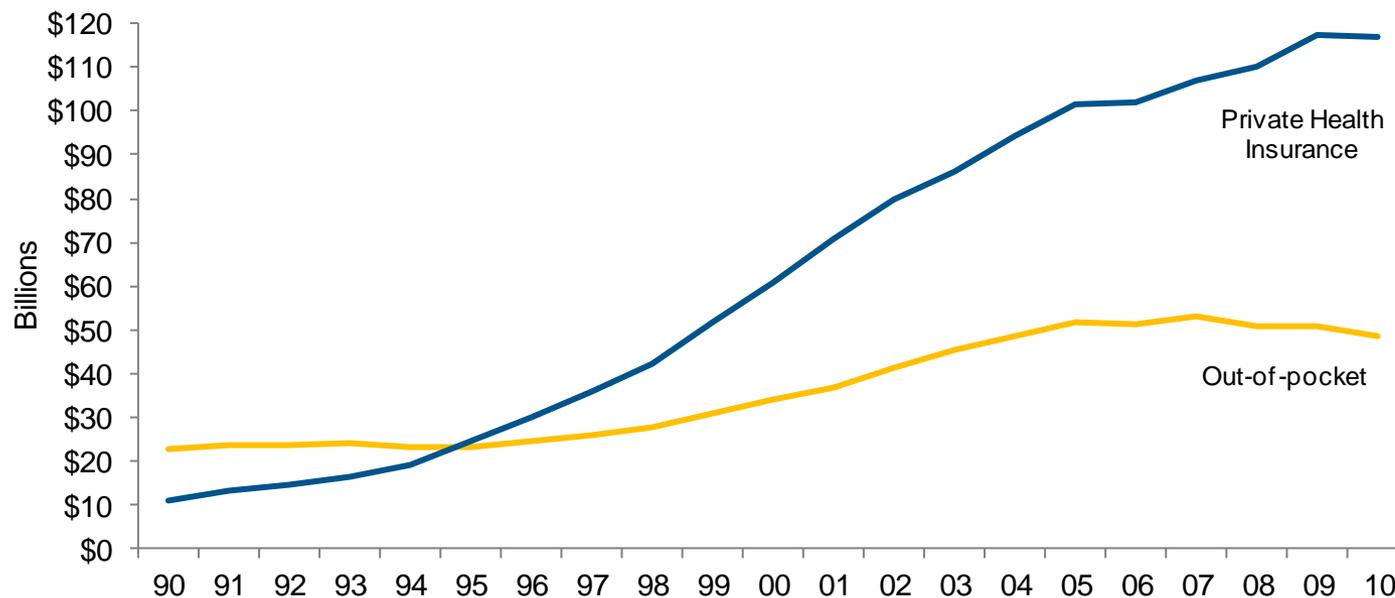
### Chart 1.11: Growth in Total Prescription Drug Spending as a Percentage of Total Growth in National Health Expenditures, 1990 – 2010<sup>(1)</sup>



Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released January 9, 2012.

<sup>(1)</sup> 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>.

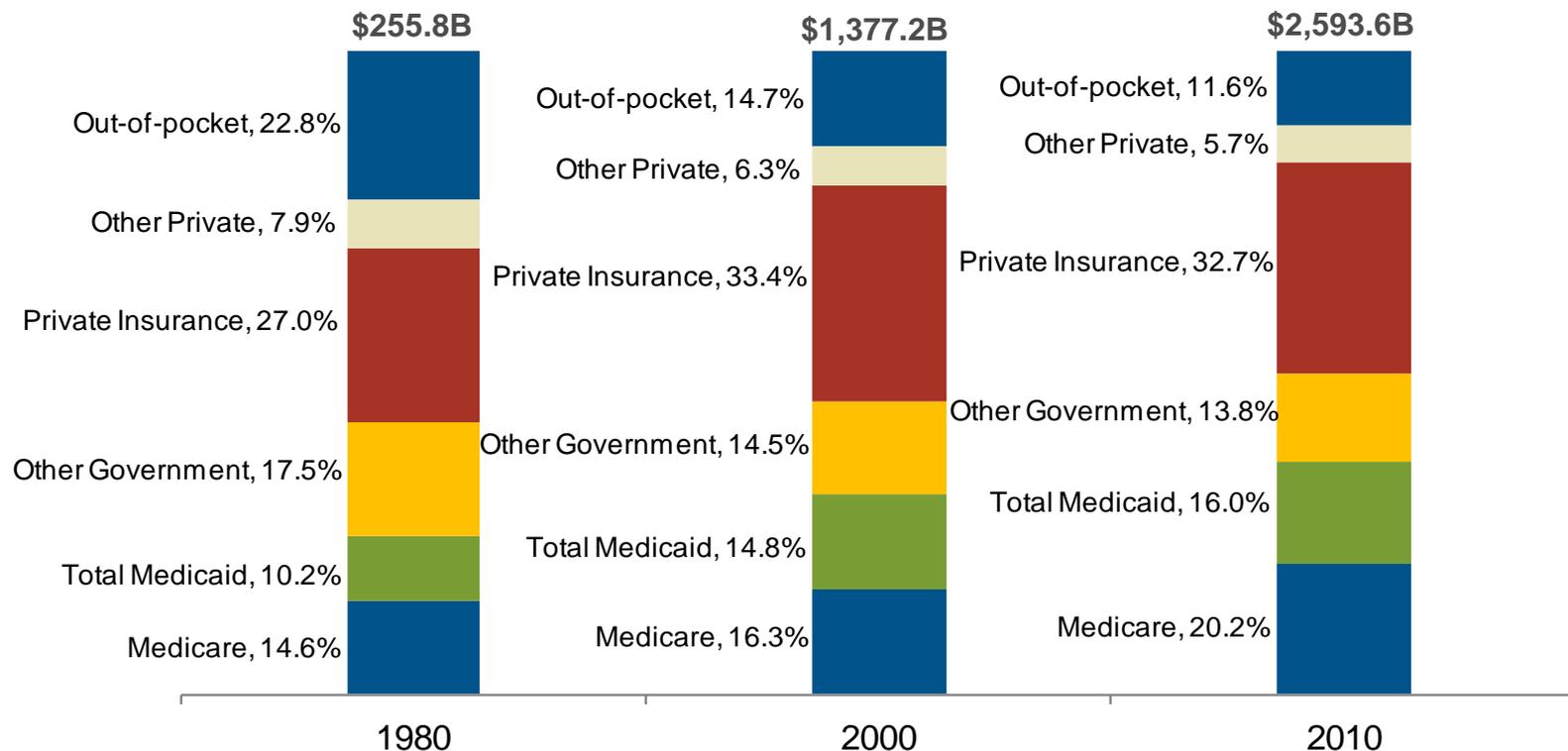
### Chart 1.12: Consumer Out-of-pocket Spending vs. Private Health Insurance Spending for Prescription Drugs, 1990 – 2010<sup>(1)</sup>



Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released January 9, 2012.

<sup>(1)</sup> 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>.

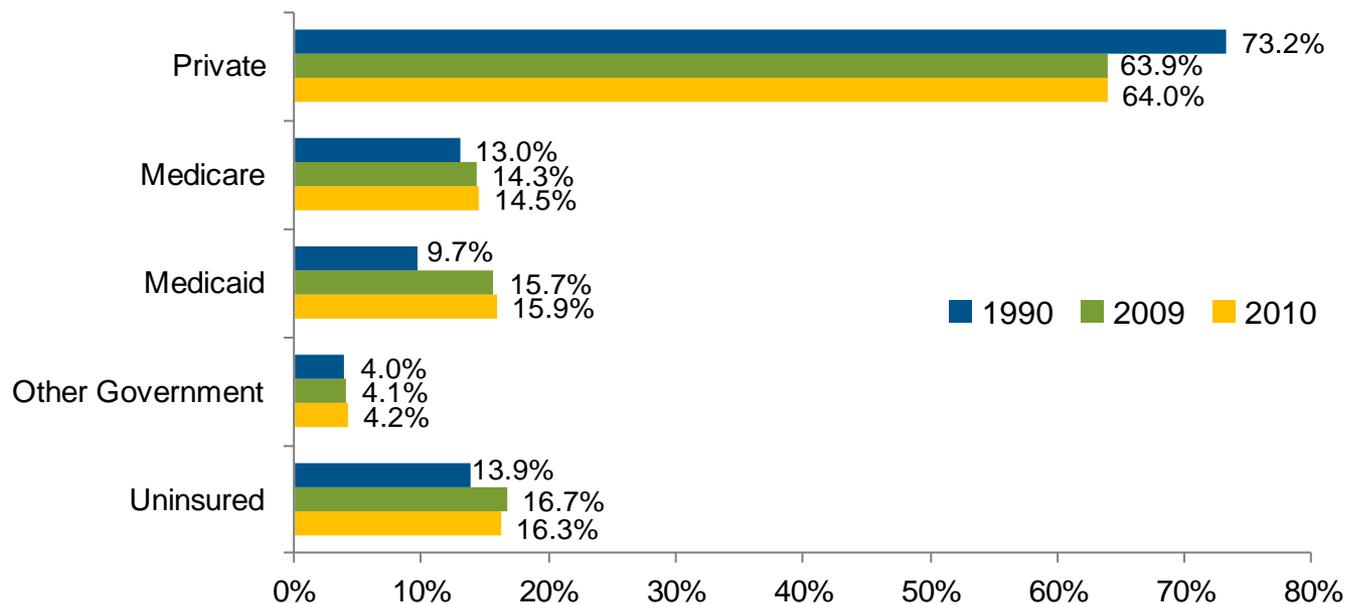
### Chart 1.13: Distribution of National Health Expenditures by Source of Payment, 1980, 2000, and 2010<sup>(1)</sup>



Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released January 9, 2012.

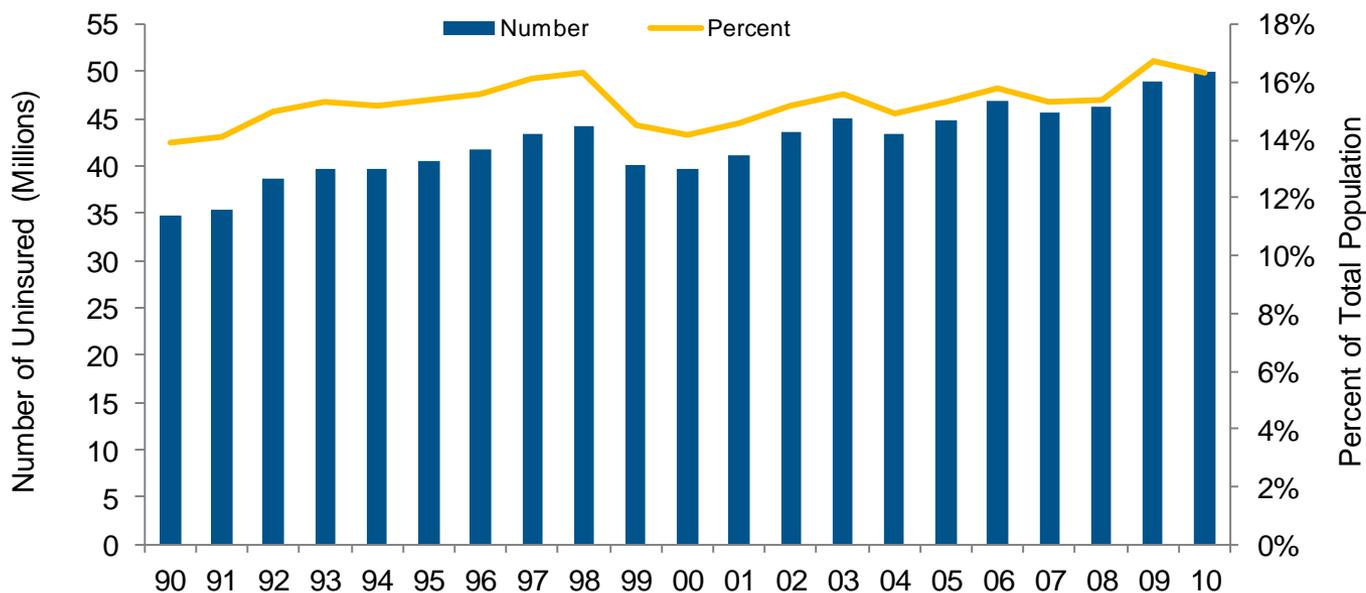
<sup>(1)</sup> CMS completed a benchmark revision in 2009, introducing changes in methods, definitions and source data that are applied to the entire time series (back to 1960). For more information on this revision, see <http://www.cms.gov/nationalhealthexpenddata/downloads/benchmark2009.pdf>.

Chart 1.14: Distribution of Health Insurance Coverage, Percentage of Population Covered by Payer, 1990, 2009, and 2010



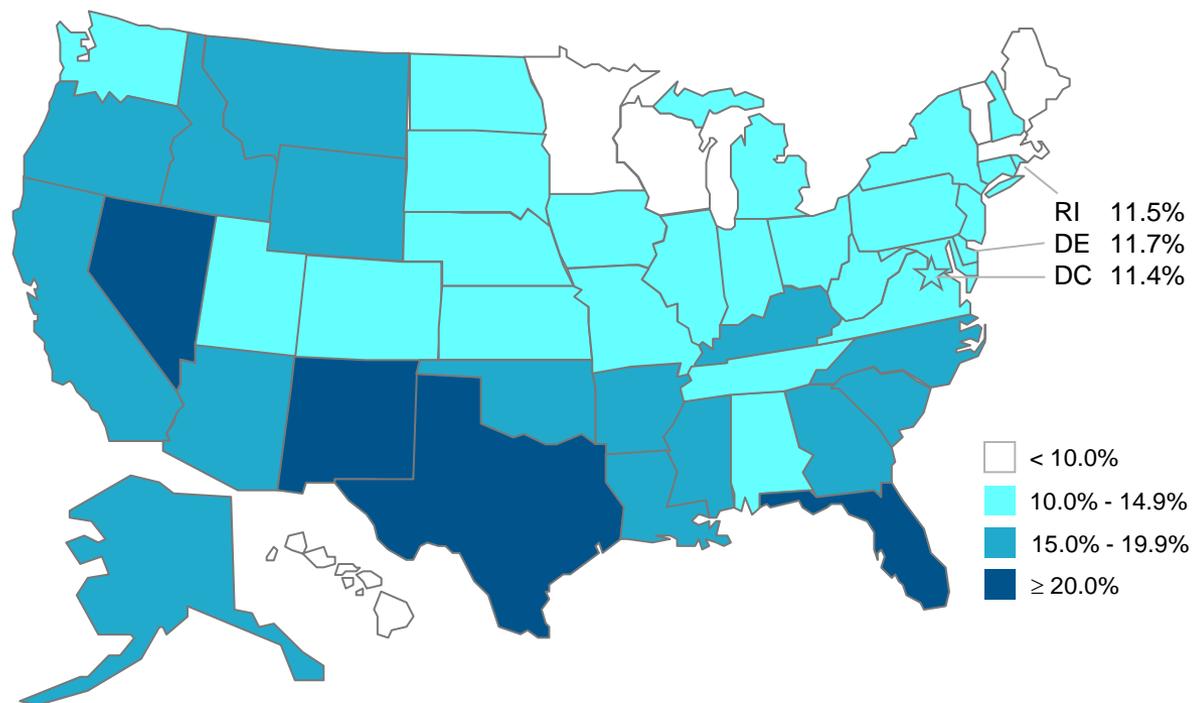
Source: US Census Bureau, Current Population Survey, 2011 Annual and Social Economic Supplement. Data released February 2011. Table HIB-4. Health Insurance Coverage Status and Type of Coverage by State All People: 1999 to 2010. Link: <http://www.census.gov/hhes/www/hlthins/data/historical/files/hihist4B.xls>.

Chart 1.15: Number and Percent Uninsured, 1990 – 2010



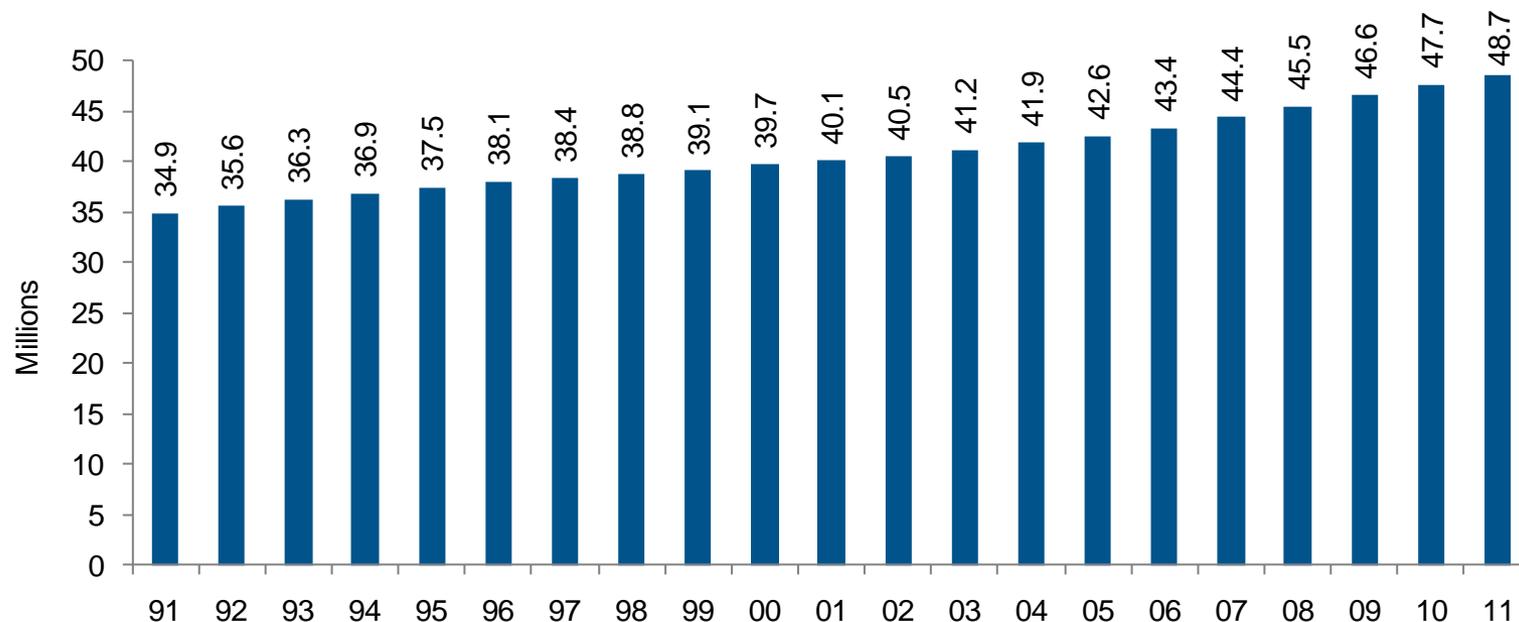
Source: US Census Bureau, Income, Poverty, and Health Insurance Coverage in the United States: 2010. Data released August 2011. Table 8. People Without Health Insurance Coverage by Selected Characteristics: 2009 and 2010.  
Link: <http://www.census.gov/hhes/www/hlthins/data/incpovhlth/2010/table8.pdf>.

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



Source: US Census Bureau, Income, Poverty, and Health Insurance Coverage in the United States: 2010. Data released August 2011. Link: <http://www.census.gov/hhes/www/hlthins/data/incpovhlth/2010/state.xls>.

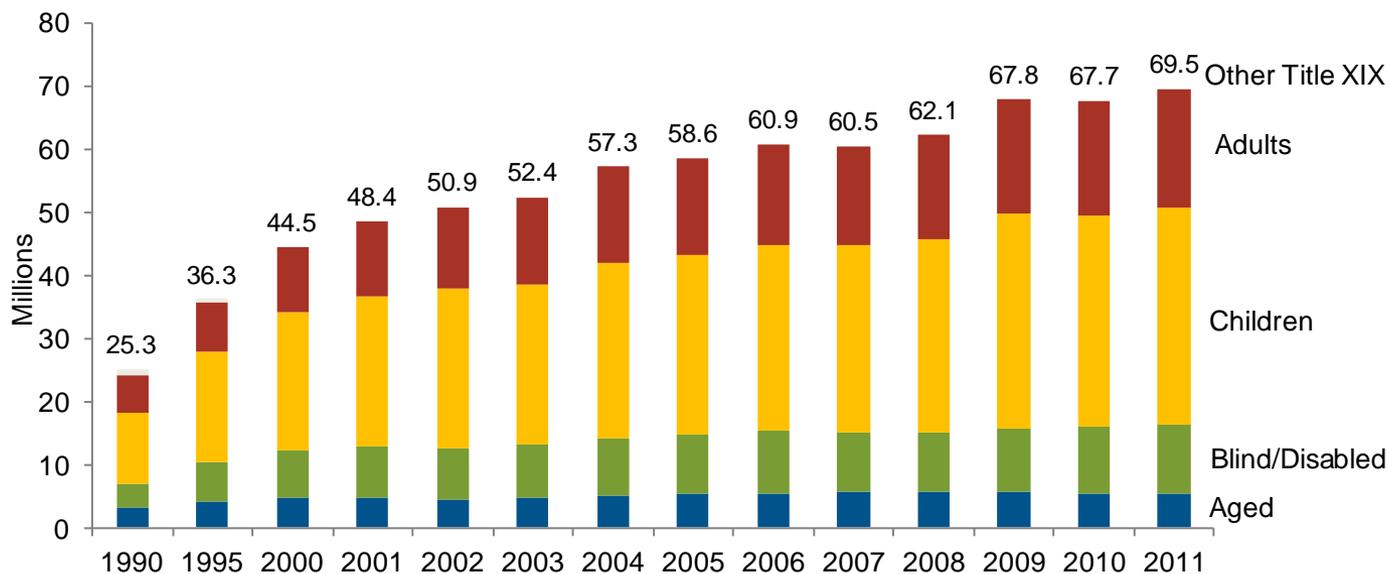
Chart 1.17: Medicare Enrollees,<sup>(1)</sup> 1991 – 2011



Source: Centers for Medicare & Medicaid Services. Medicare Enrollment: National Trends, 1966 – 2005; Medicare Aged and Disabled Enrollees by Type of Coverage. CMS, Office of the Actuary. Email correspondence with CMS staff (for years 2001 – 2011).

<sup>(1)</sup> Hospital insurance (Part A) enrollees and/or Supplementary Medical Insurance (Part B) enrollees; includes all persons (aged and disabled).

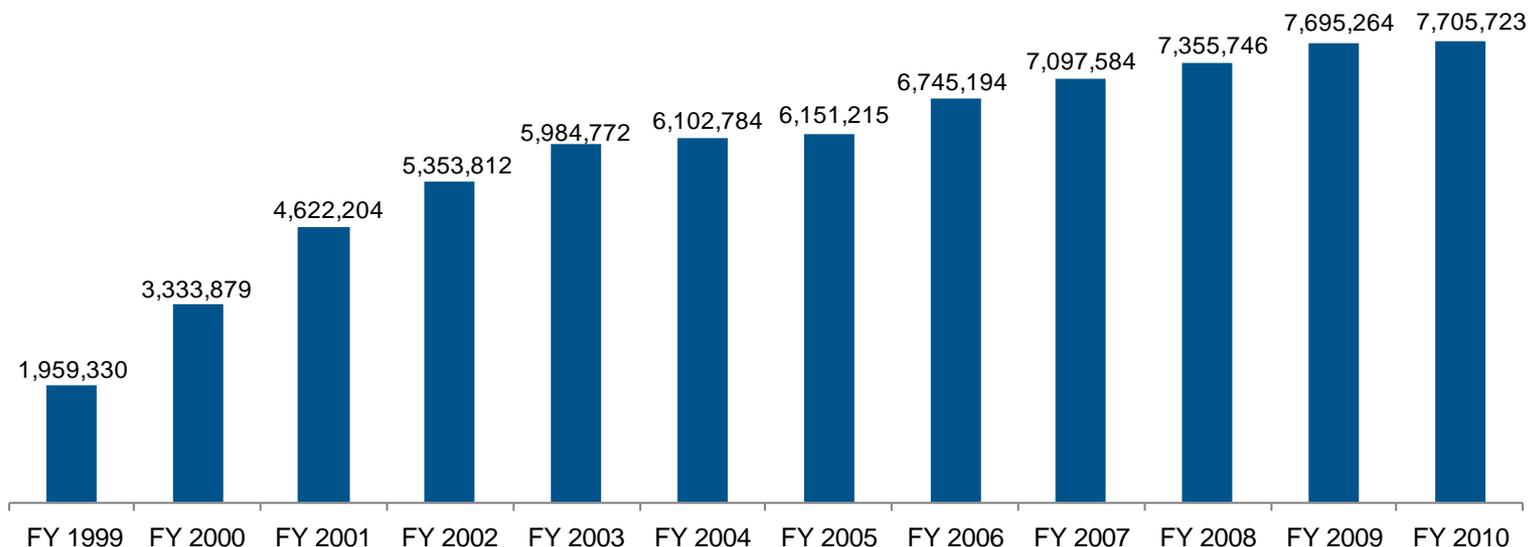
Chart 1.18: Medicaid Enrollees,<sup>(1)</sup> 1990, 1995, 2000 – 2011



Source: Congressional Budget Office. Data released February 2011. Spending and Enrollment Detail for CBO's March 2011 Baseline: Medicaid. Link: <http://www.cbo.gov/budget/factsheets/2011b/medicaid.pdf>.

<sup>(1)</sup> Does not include CHIP Enrollees.

Chart 1.19: National CHIP Enrollment,<sup>(1, 2)</sup> FY 1999 – FY 2010

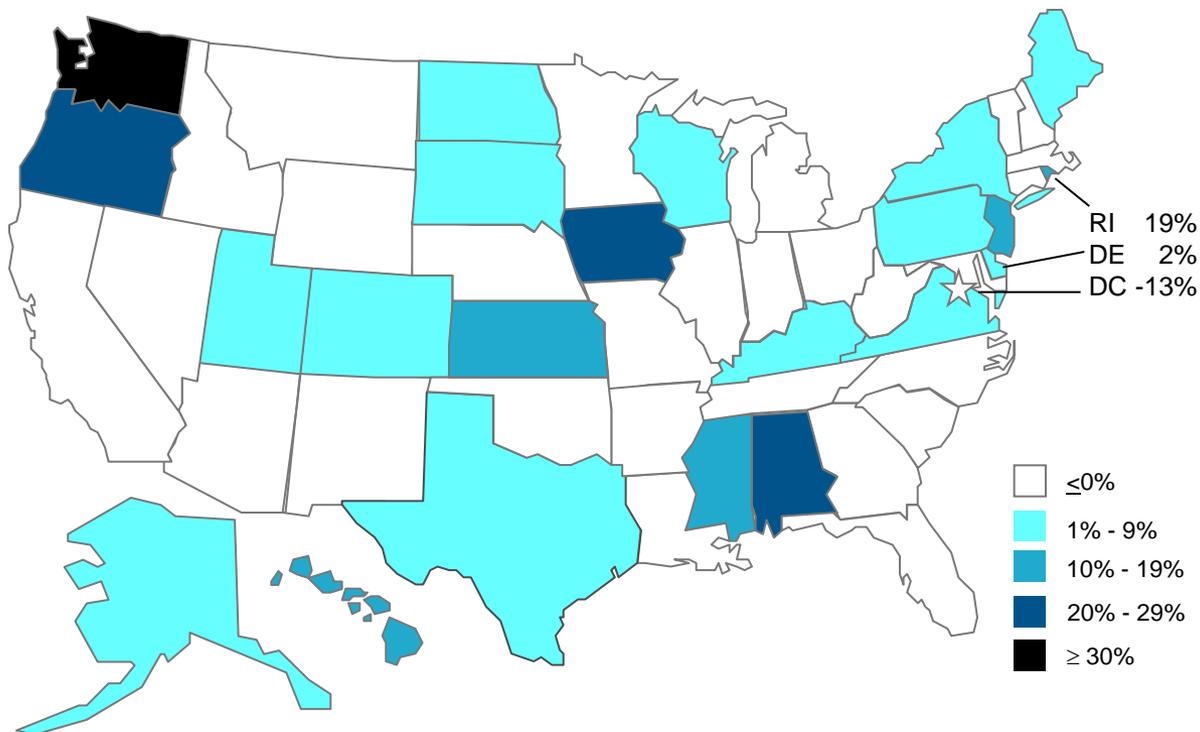


Source: Centers for Medicare & Medicaid Services. Data released February 2011. Number of Children Ever Enrolled by Program Type. Link: <http://www.cms.hhs.gov/NationalCHIPPolicy/downloads/CHIEverEnrolledYearGraph.pdf>.

(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.

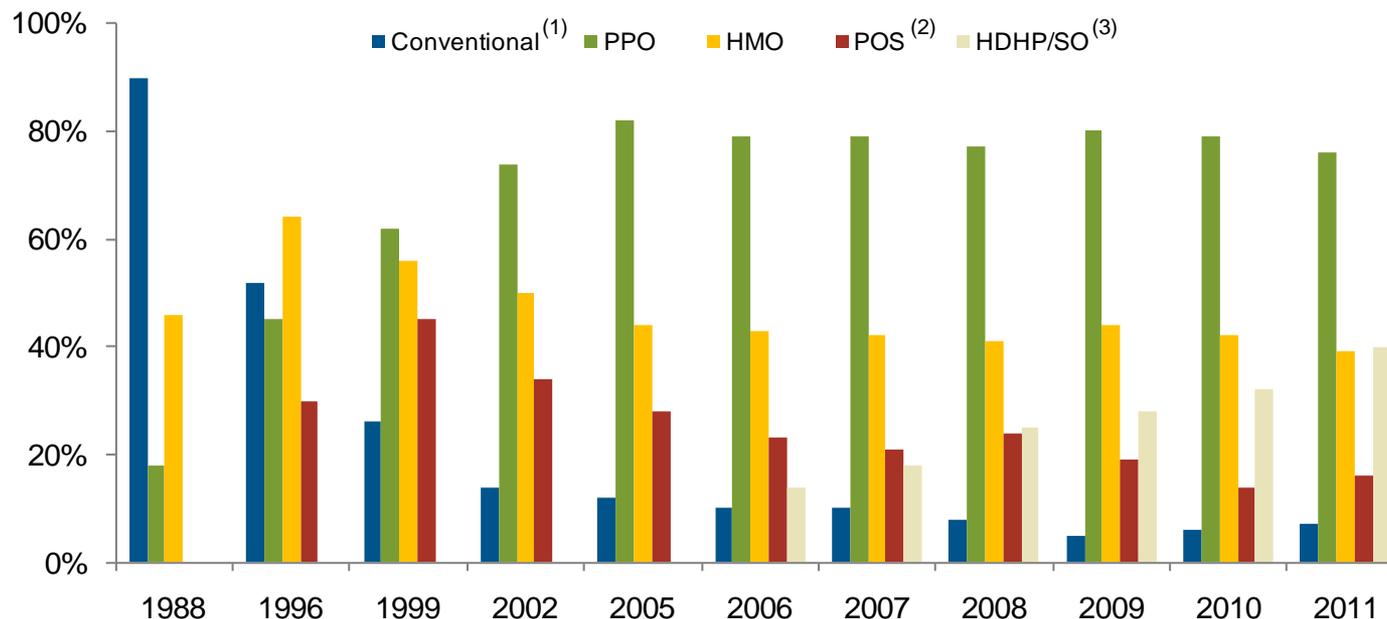
### Chart 1.20: Percent Change in CHIP Enrollment by State, FY 2009 – FY 2010<sup>(1)</sup>



Source: Centers for Medicare & Medicaid Services. Data released February 2011. Number of Children Ever Enrolled by Program Type. Link: [http://www.cms.gov/NationalCHIPPolicy/downloads/FY2010StateCHIPTotalTable\\_020111\\_FINAL.pdf](http://www.cms.gov/NationalCHIPPolicy/downloads/FY2010StateCHIPTotalTable_020111_FINAL.pdf).

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

### Chart 1.21: Percentage of Employees with Employer-based Coverage Who Can Choose Conventional, PPO, HMO, POS, and HDHP/SO Plans, 1988 – 2011



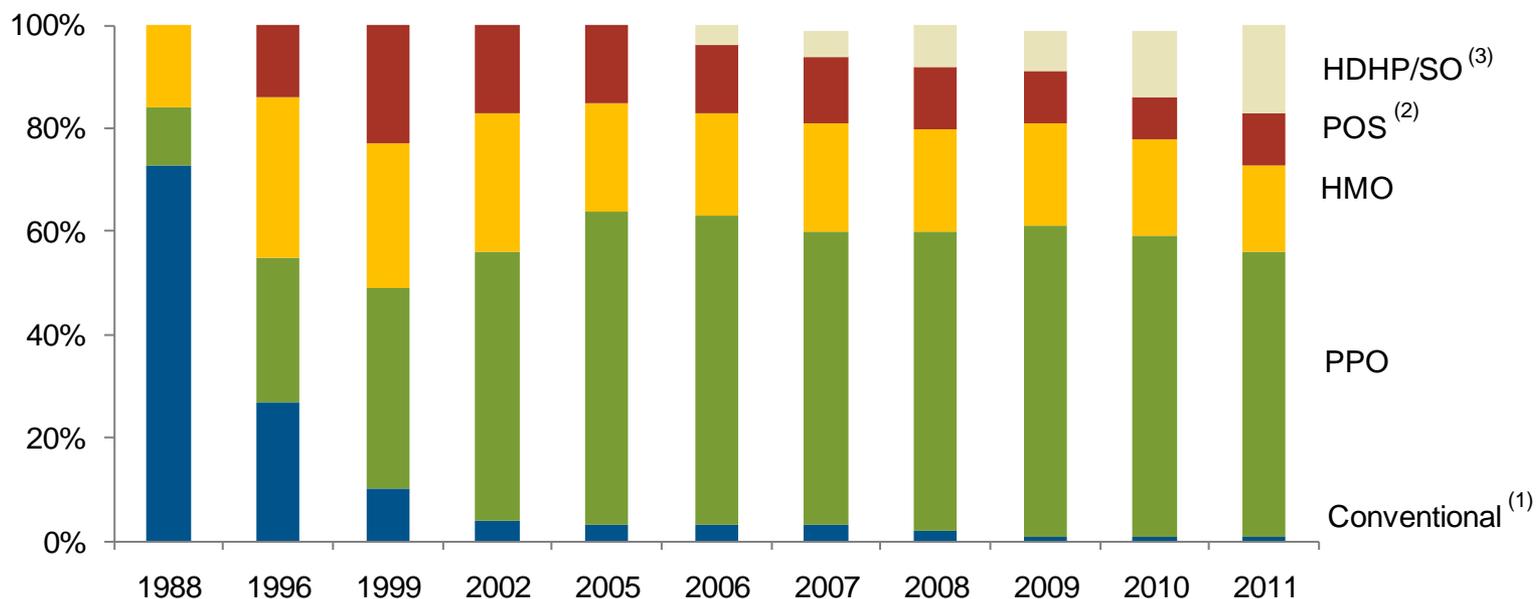
Source: The Kaiser Family Foundation and Health Research and Educational Trust. Data Released 2011. Employer Health Benefits: 1999, 2002, 2005, 2006, 2007, 2008, 2009, 2010, 2011. Link: <http://ehbs.kff.org/pdf/2011/8225.pdf>. KPMG Survey of Employer-Sponsored Health Benefits: 1988, 1996.

(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



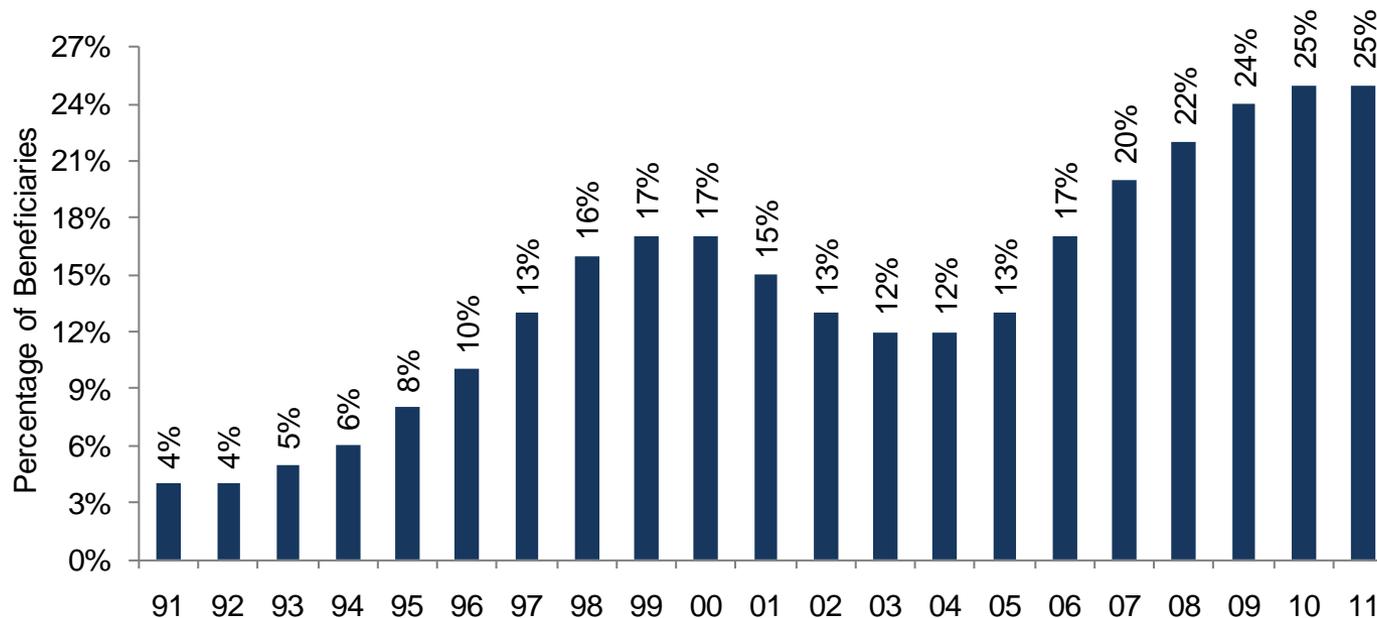
Source: The Kaiser Family Foundation and Health Research and Educational Trust. Data Released 2011. Employer Health Benefits: 1999, 2002, 2005, 2006, 2007, 2008, 2009, 2010, 2011. Link: <http://ehbs.kff.org/pdf/2011/8225.pdf>. KPMG Survey of Employer-Sponsored Health Benefits: 1988, 1996.

(1) Conventional plans refer to traditional indemnity plans.

(2) Point-of-service plans not separately identified in 1988.

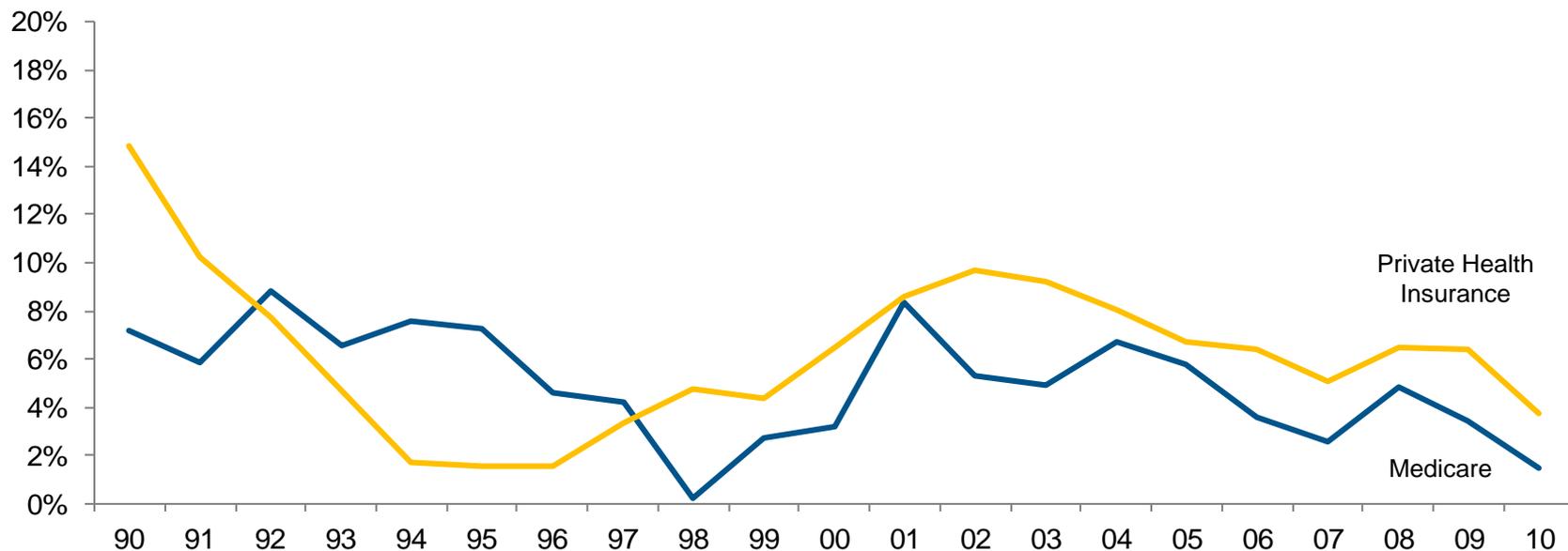
(3) In 2006, the survey began asking about HDHP/SO, high deductible health plans with a savings option.

### 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.

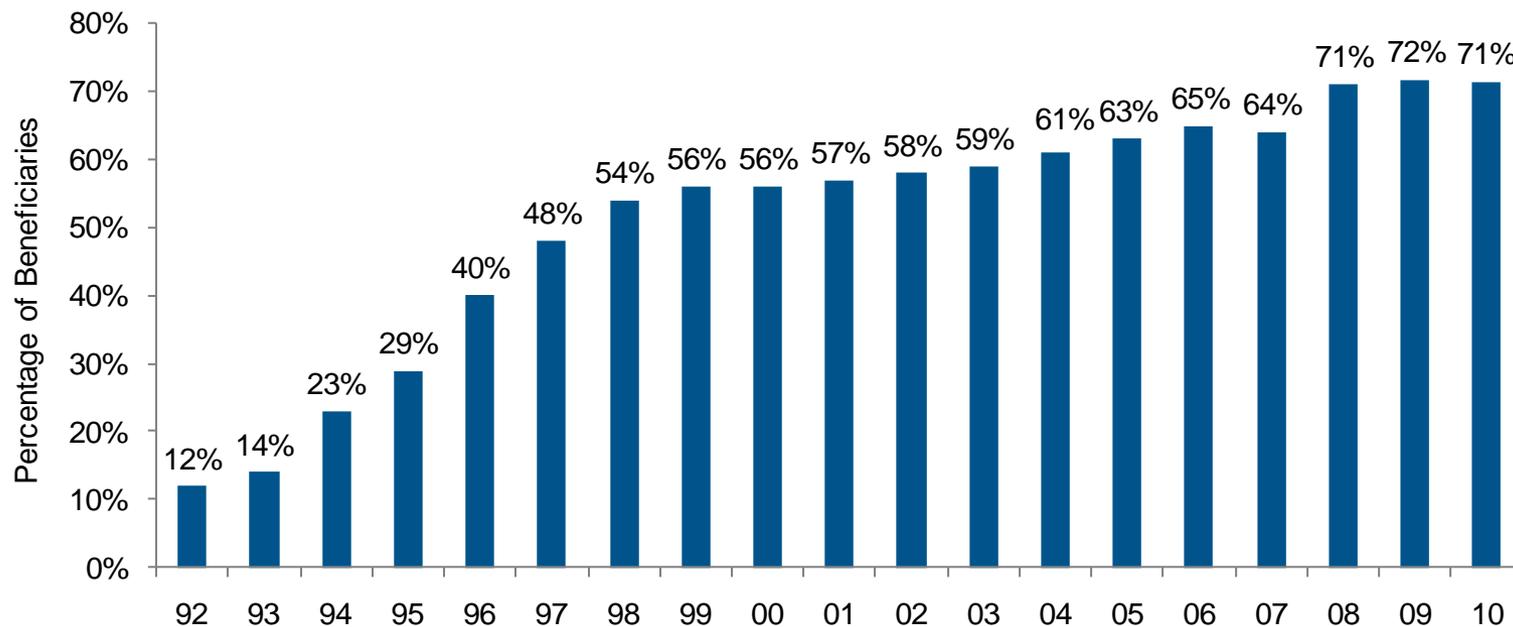
### Chart 1.24: Percent Growth in Medicare Spending per Beneficiary vs. Private Health Insurance Spending per Enrollee, 1990 – 2010<sup>(1,2)</sup>



Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released January 9, 2012.

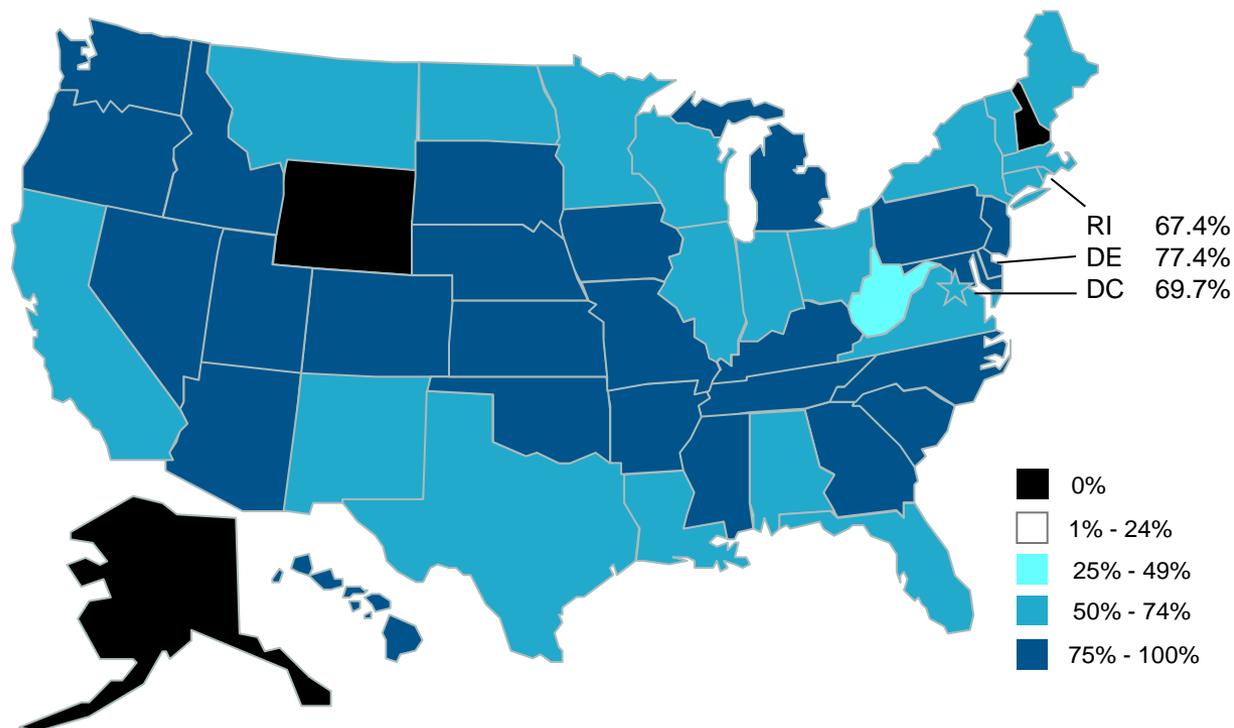
- (1) CMS completed a benchmark revision in 2009, introducing changes in methods, definitions and source data that are applied to the entire time series (back to 1960). For more information on this revision, see <http://www.cms.hhs.gov/NationalHealthExpendData/downloads/tables.pdf>.
- (2) Data reflects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



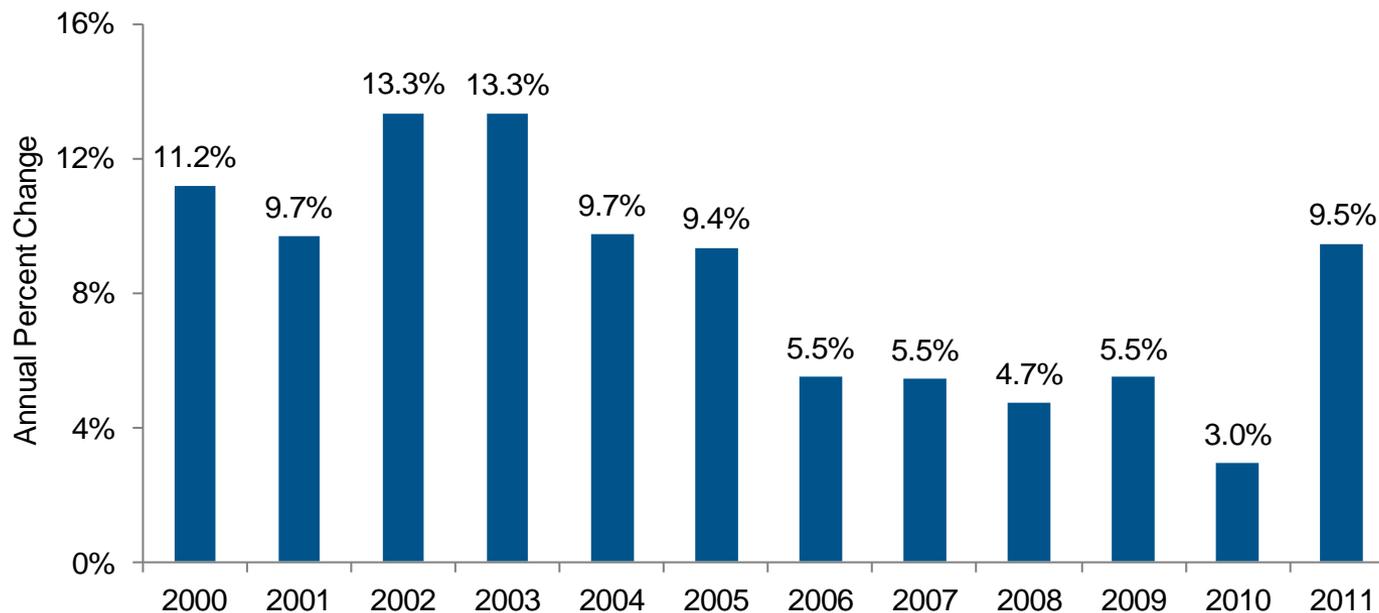
Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Medicaid Managed Care Enrollment Report as of June 30, 2010.

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



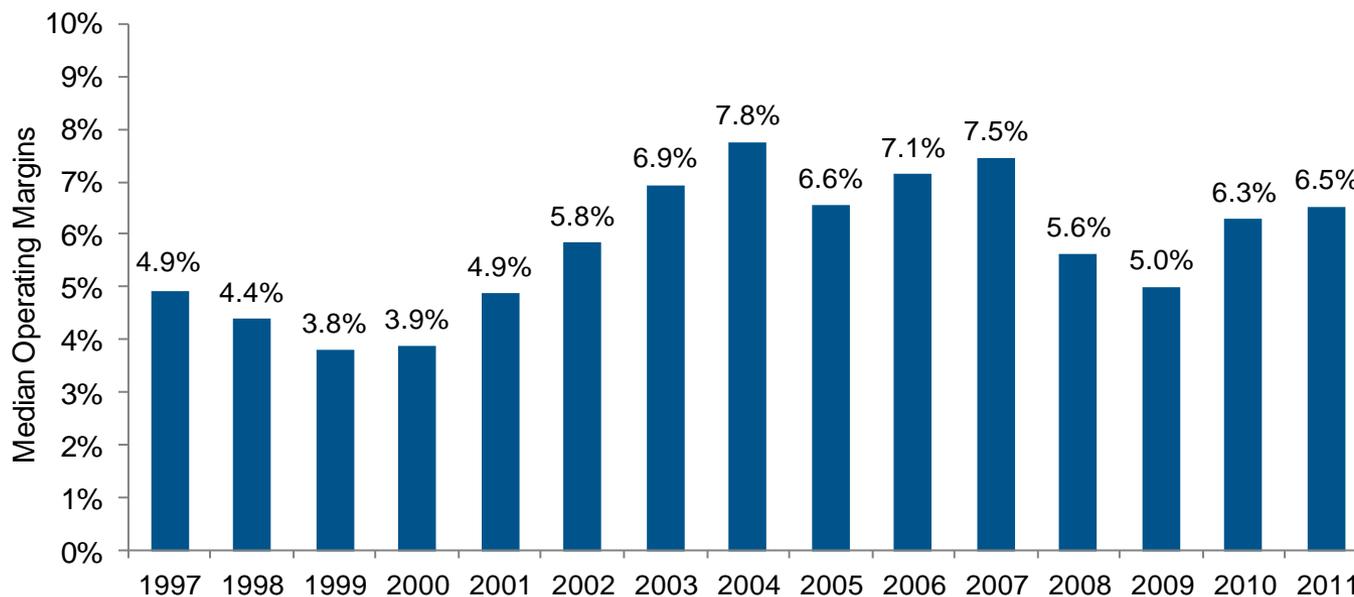
Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Medicaid Managed Care Enrollment Report as of June 30, 2010.

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



Source: The Kaiser Family Foundation and Health Research and Educational Trust. Data Released 2011.  
Link: <http://ehbs.kff.org/pdf/2011/8225.pdf>.

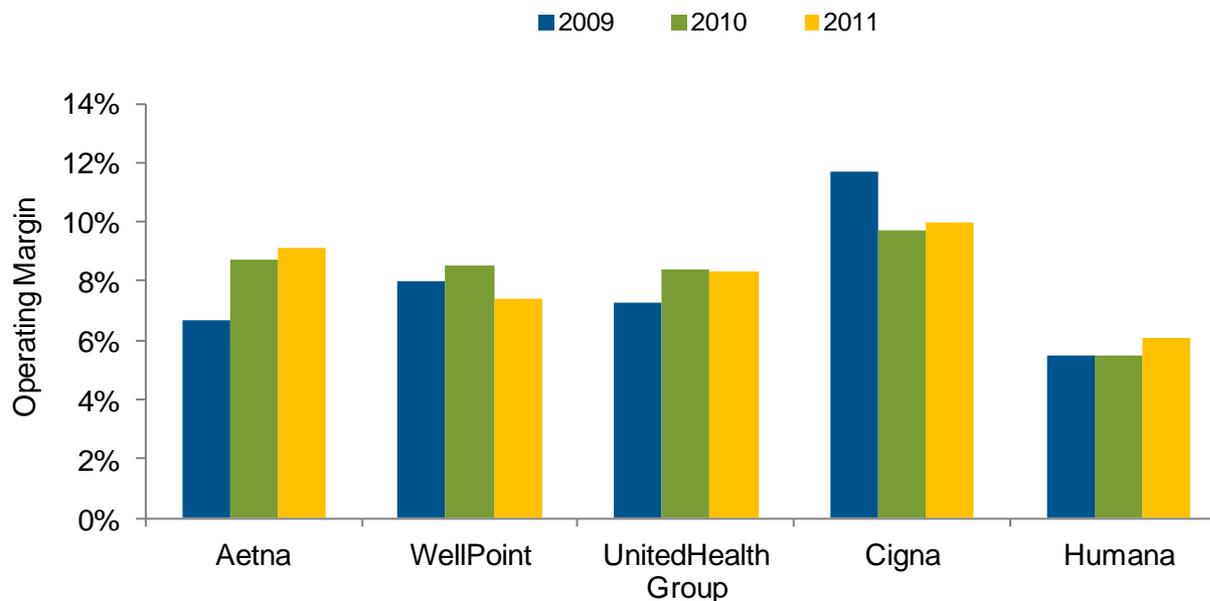
### Chart 1.28: Managed Care Plan Median Operating Margins,<sup>(1)</sup> 1997 – 2011



Source: Company documents of publicly traded managed care plans.

<sup>(1)</sup> 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.



# CHAPTER 2

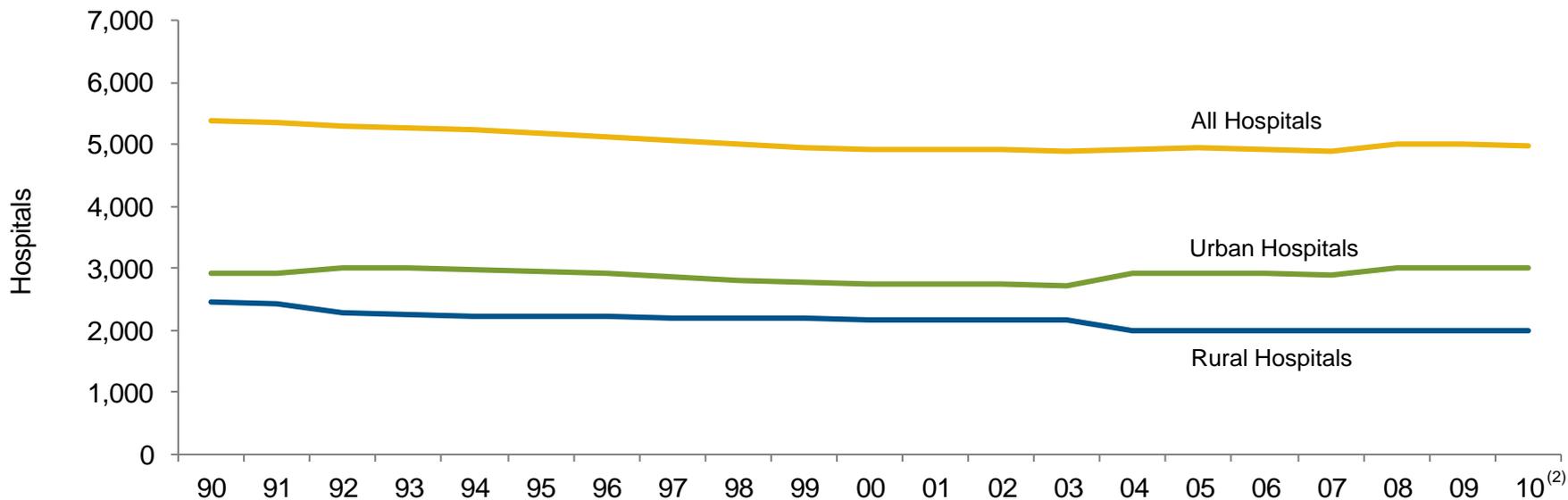
Organizational Trends

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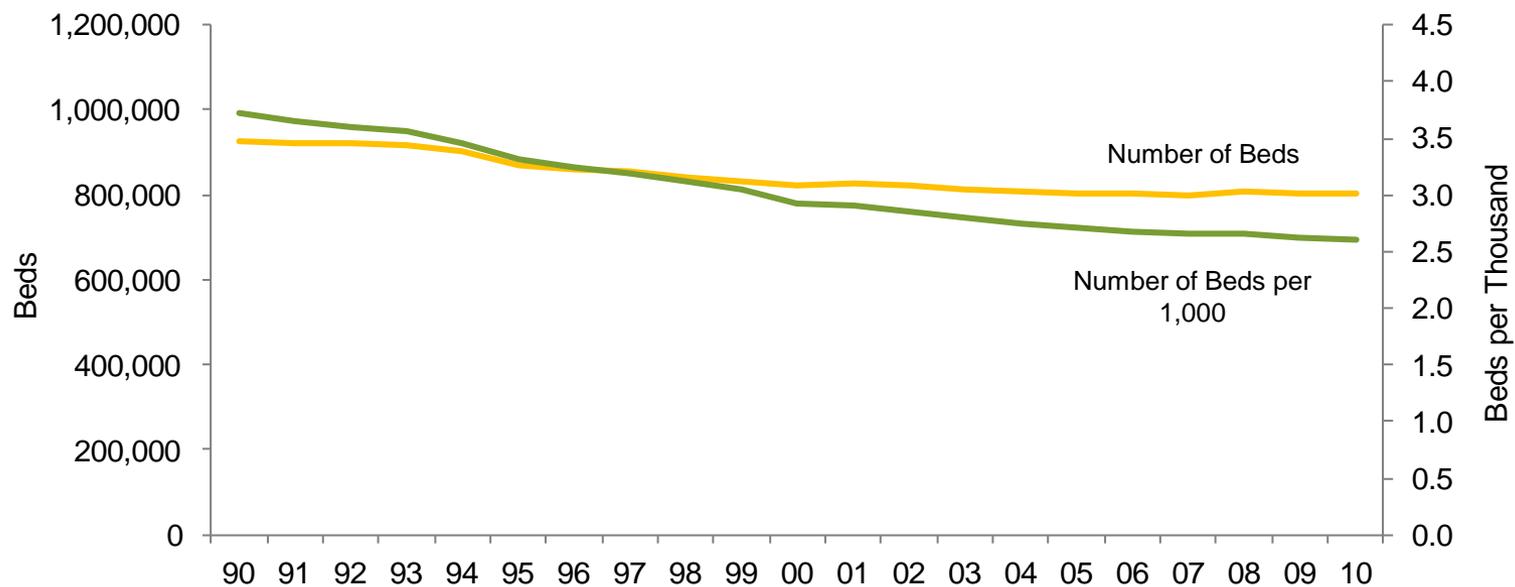
### Chart 2.1: Number of Community Hospitals,<sup>(1)</sup> 1990 – 2010



Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

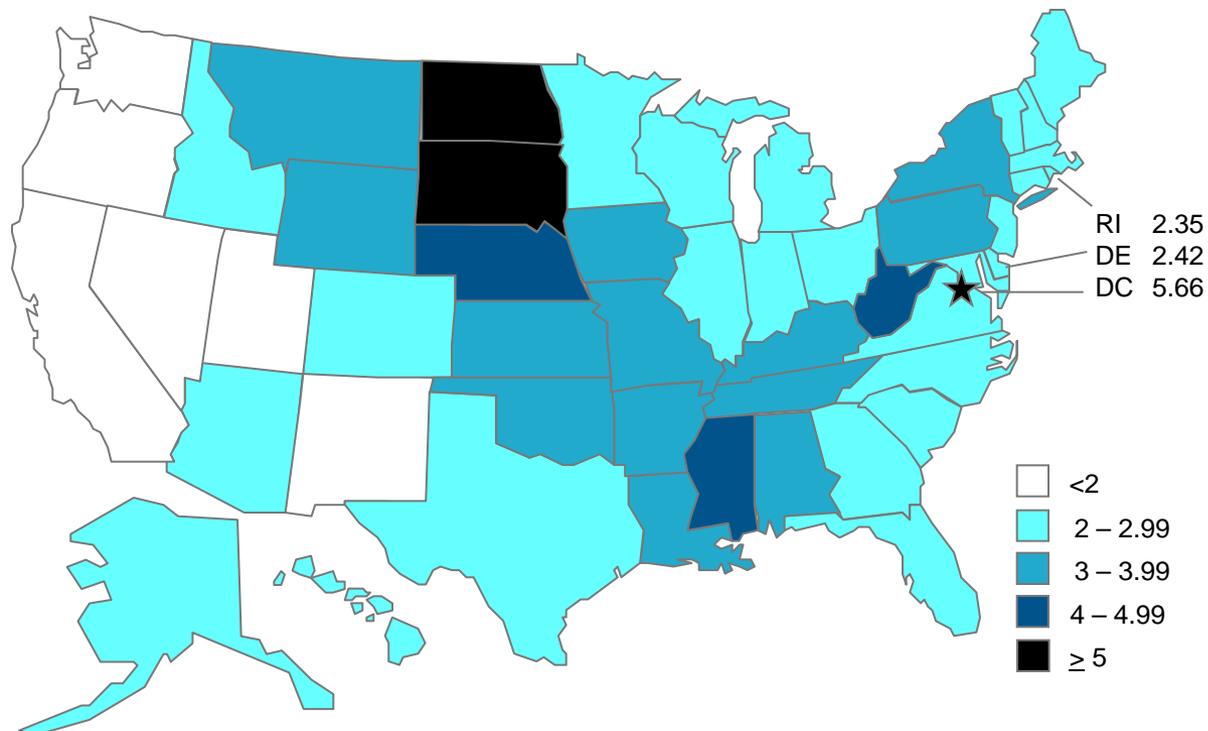
- (1) All nonfederal, short-term general, and specialty hospitals whose facilities and services are available to the public.
- (2) Data on the number of urban and rural hospitals in 2004 and beyond were collected using coding different from previous years to reflect new Centers for Medicare & Medicaid Services wage area designations.

### Chart 2.2: Number of Beds and Number of Beds per 1,000 Persons, 1990 – 2010



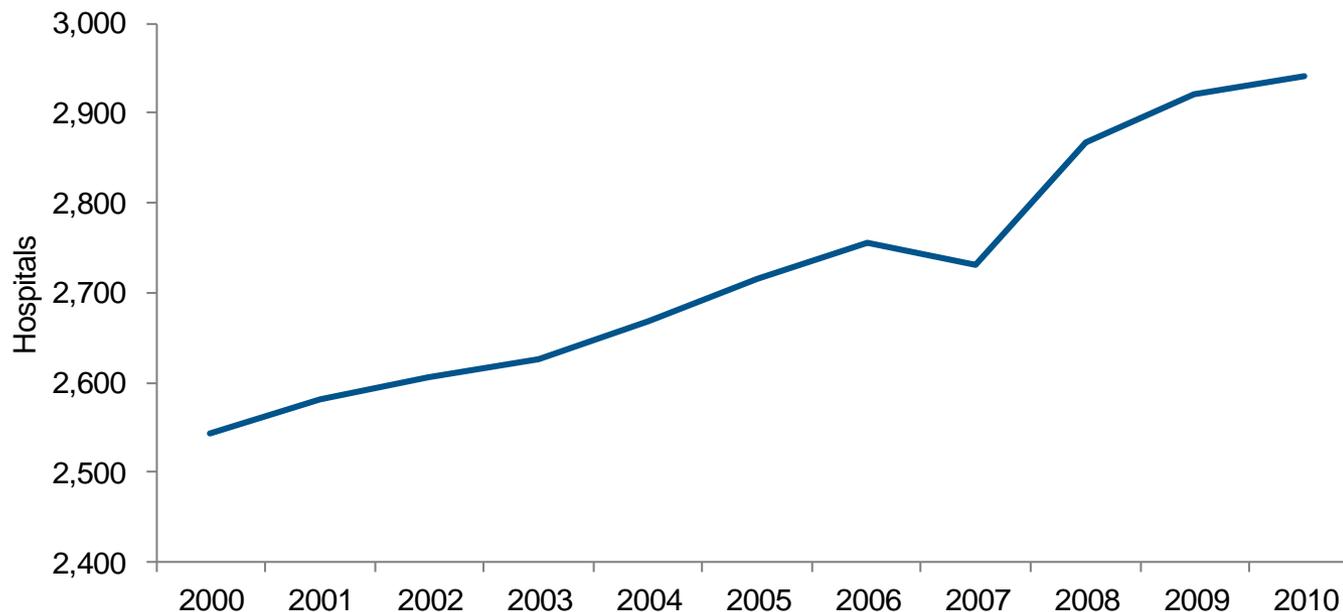
Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

### Chart 2.3: Beds per 1,000 by State, 2010



Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals. US Census Bureau: National and State Population Estimates, July 1, 2010.  
Link: <http://www.census.gov/popest/data/intercensal/state/state2010.html>.

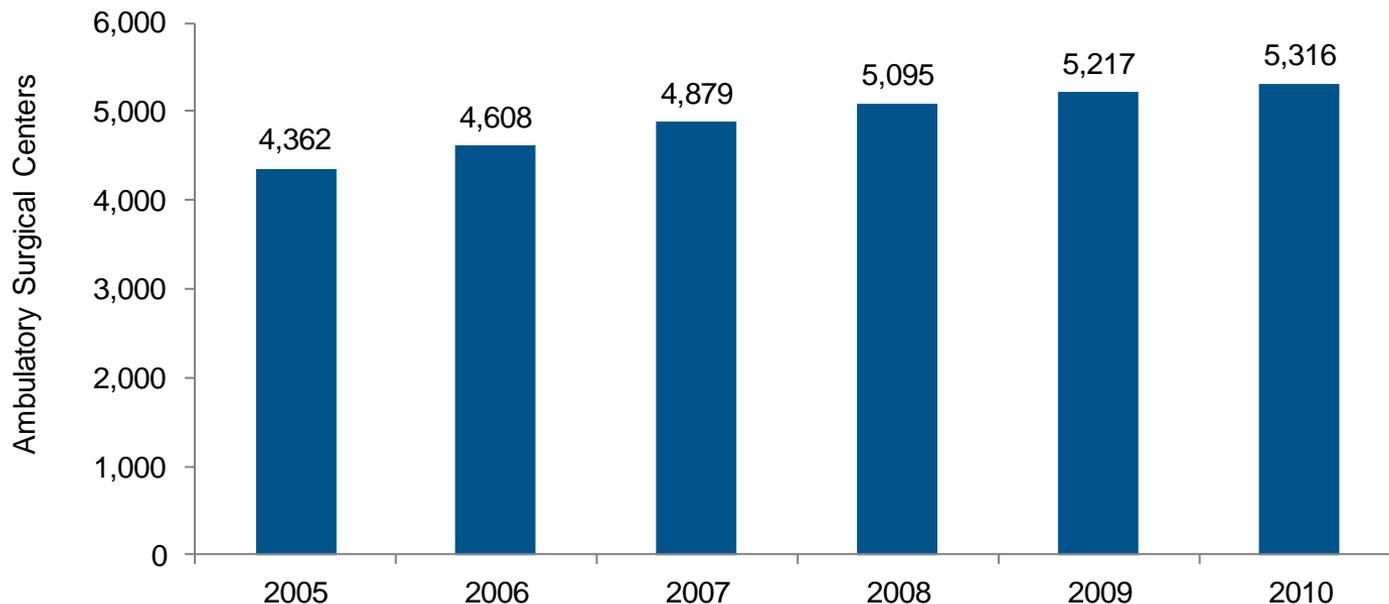
Chart 2.4: Number of Hospitals in Health Systems,<sup>(1)</sup> 2000 – 2010



Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

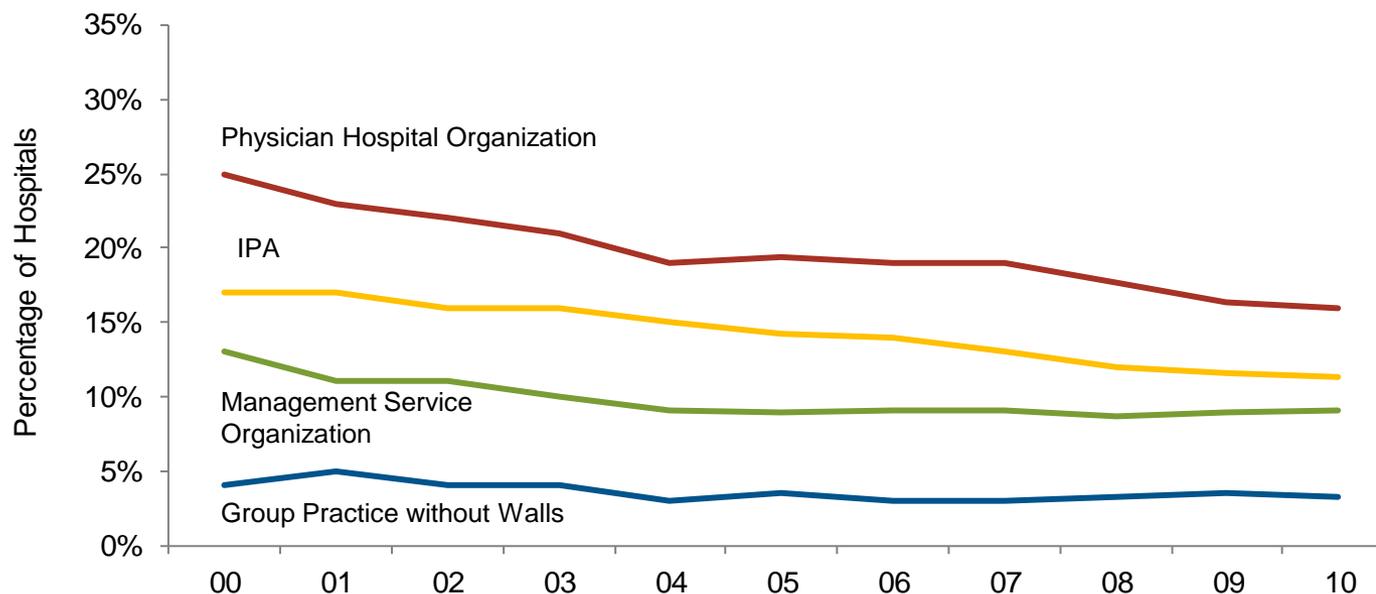
<sup>(1)</sup> Hospitals that are part of a corporate body that may own and/or manage health provider facilities or health-related subsidiaries as well as non-health-related facilities including freestanding and/or subsidiary corporations.

### Chart 2.5: Number of Medicare-certified Ambulatory Surgical Centers, 2005 – 2010



Source: Medicare Payment Advisory Commission. (March 2012). *Report to Congress: Medicare Payment Policy*.  
Link: [http://www.medpac.gov/documents/Mar12\\_EntireReport.pdf](http://www.medpac.gov/documents/Mar12_EntireReport.pdf).

### Chart 2.6: Percentage of Hospitals with Physician Affiliates<sup>(1)</sup> by Type of Relationship, 2000 – 2010

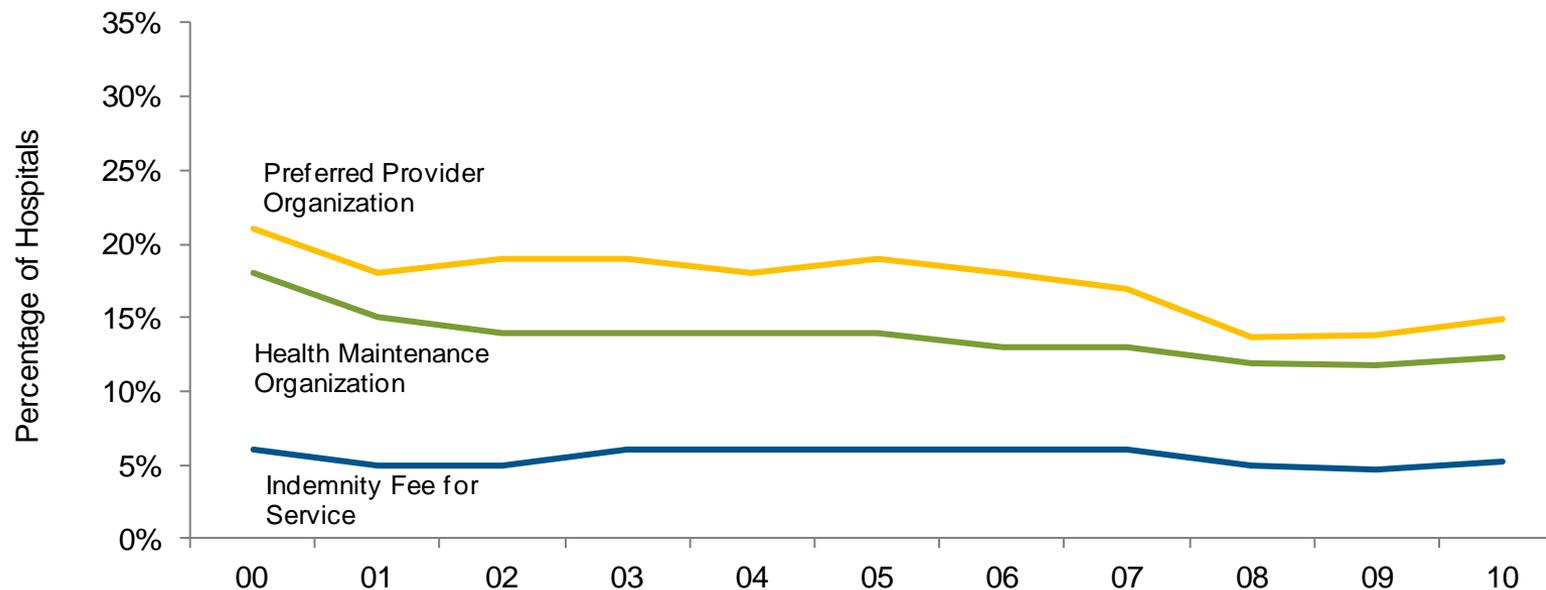


Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

<sup>(1)</sup> A hospital is considered to have a physician relationship if the relationship exists as part of the hospital or a system or network of which the hospital is a part.

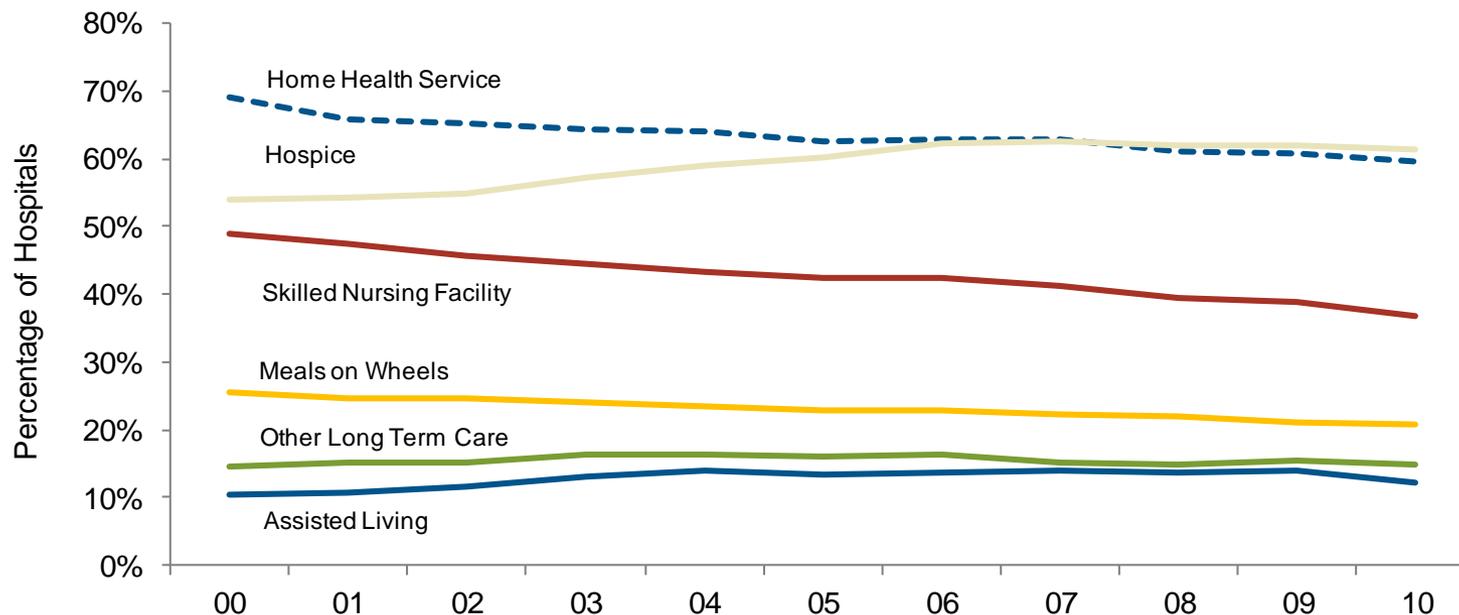
Previously Chart 2.7 in 2009 and earlier years' Chartbooks.

### Chart 2.7: Percentage of Hospitals with Insurance Products by Type of Insurance, 2000 – 2010



Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals. Previously Chart 2.8 in 2009 and earlier years' Chartbooks.

### Chart 2.8: Percentage of Hospitals Offering “Non-hospital” Services,<sup>(1)</sup> 2000 – 2010

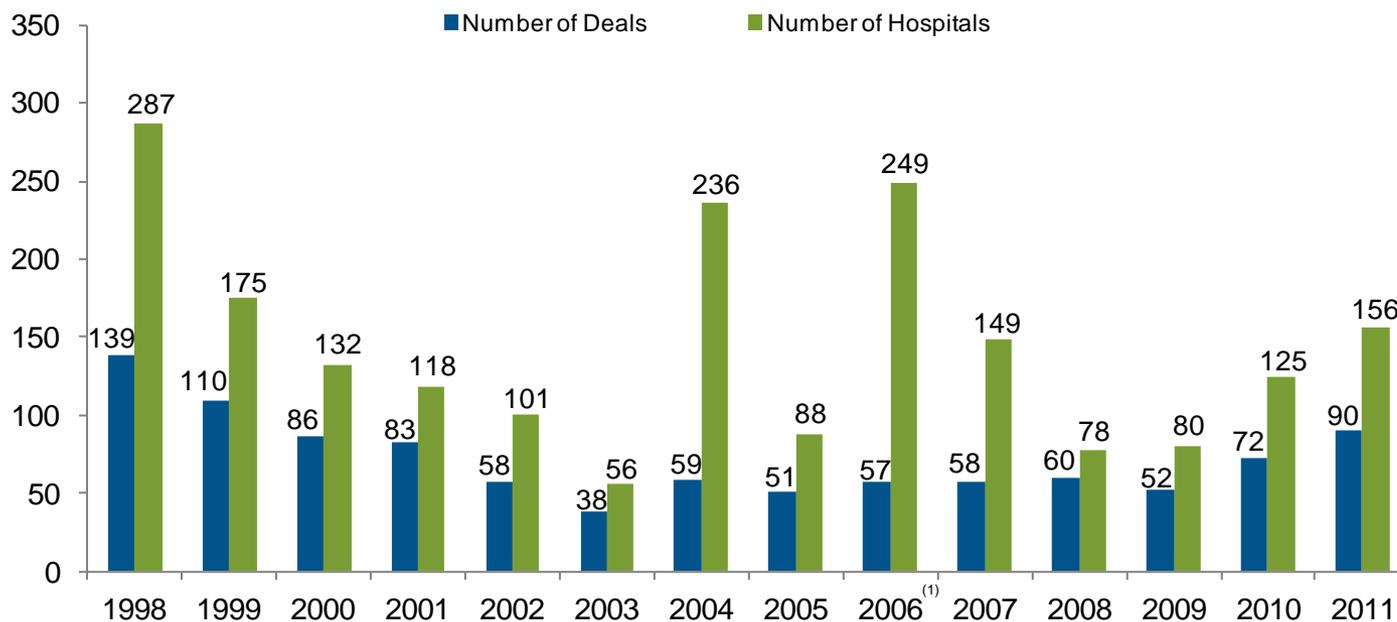


Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010 for community hospitals.

<sup>(1)</sup> Includes services offered in hospital, health system, network or joint venture.

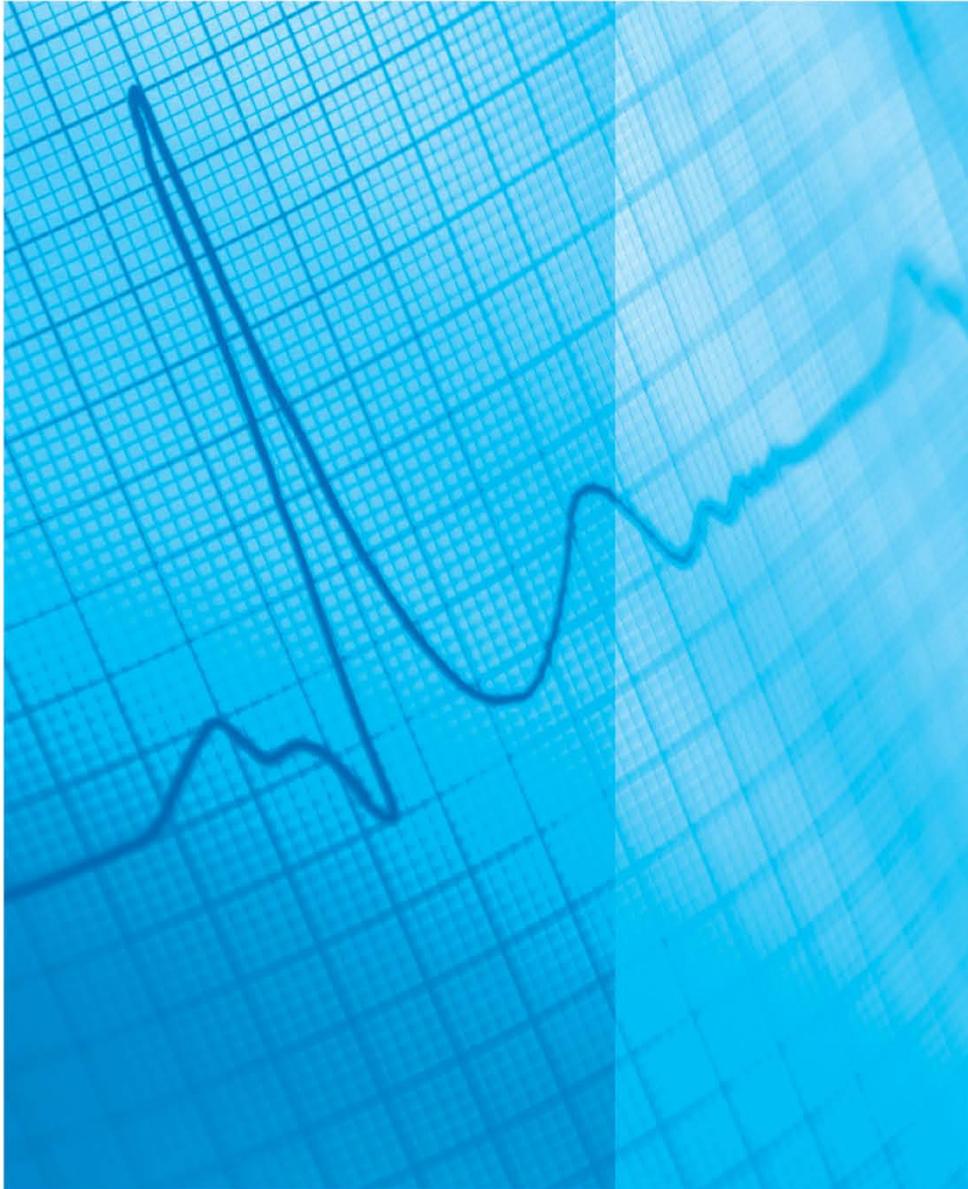
Previously Chart 2.9 in 2009 and earlier years' Chartbooks.

Chart 2.9: Announced Hospital Mergers and Acquisitions, 1998 – 2011



Source: Irving Levin Associates, Inc., *The Health Care Acquisition Report*, Eighteenth Edition, 2012.

<sup>(1)</sup> In 2006, the privatization of HCA, Inc. affected 176 acute-care hospitals. The acquisition was the largest health care transaction ever announced.



# CHAPTER 3

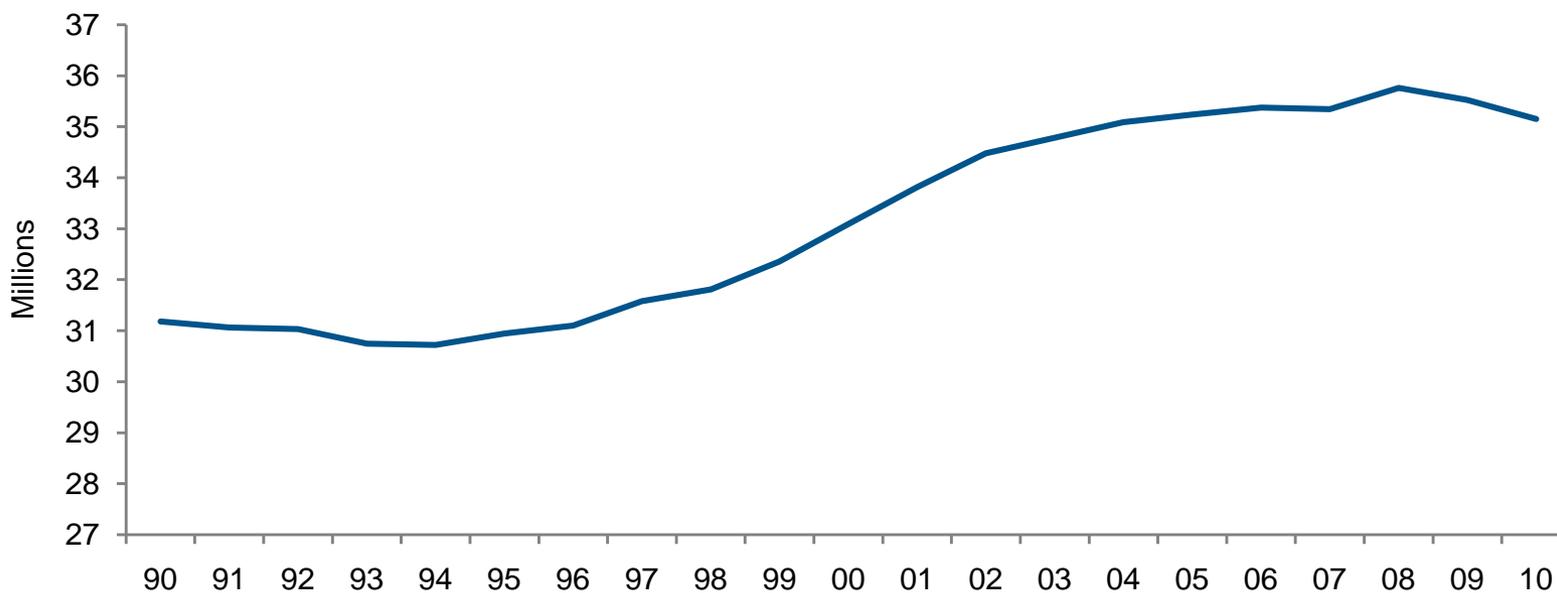
Utilization and Volume

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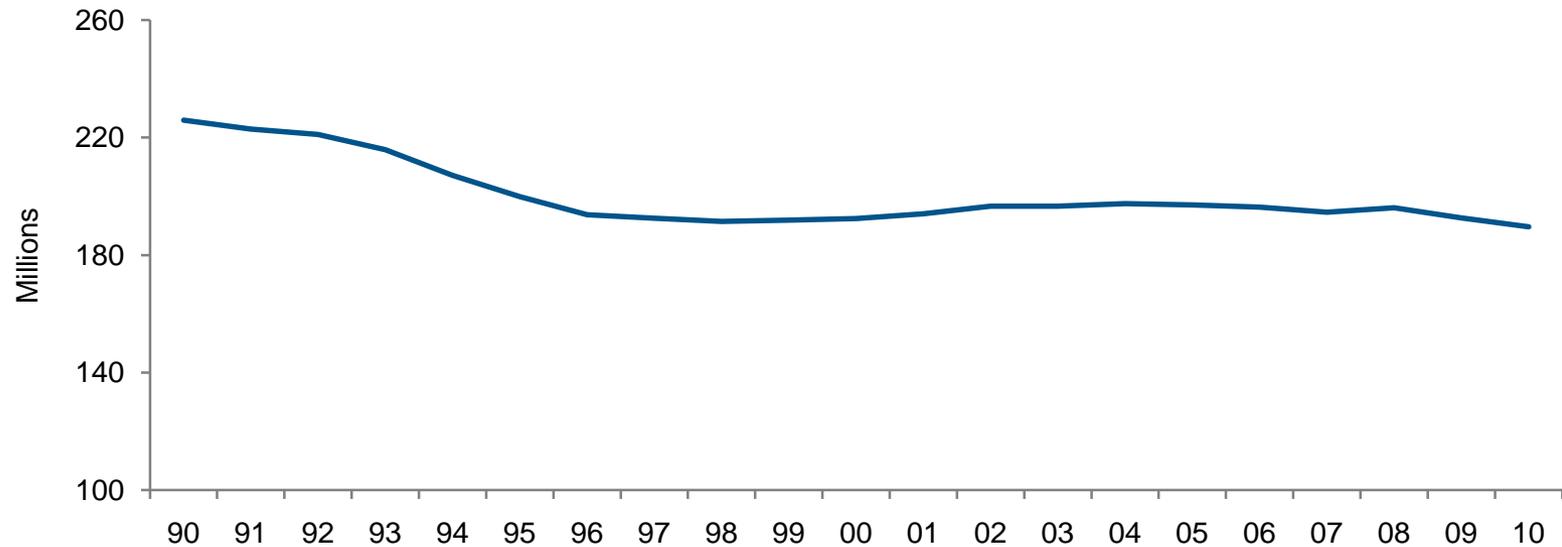
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### Chart 3.1: Inpatient Admissions in Community Hospitals, 1990 – 2010



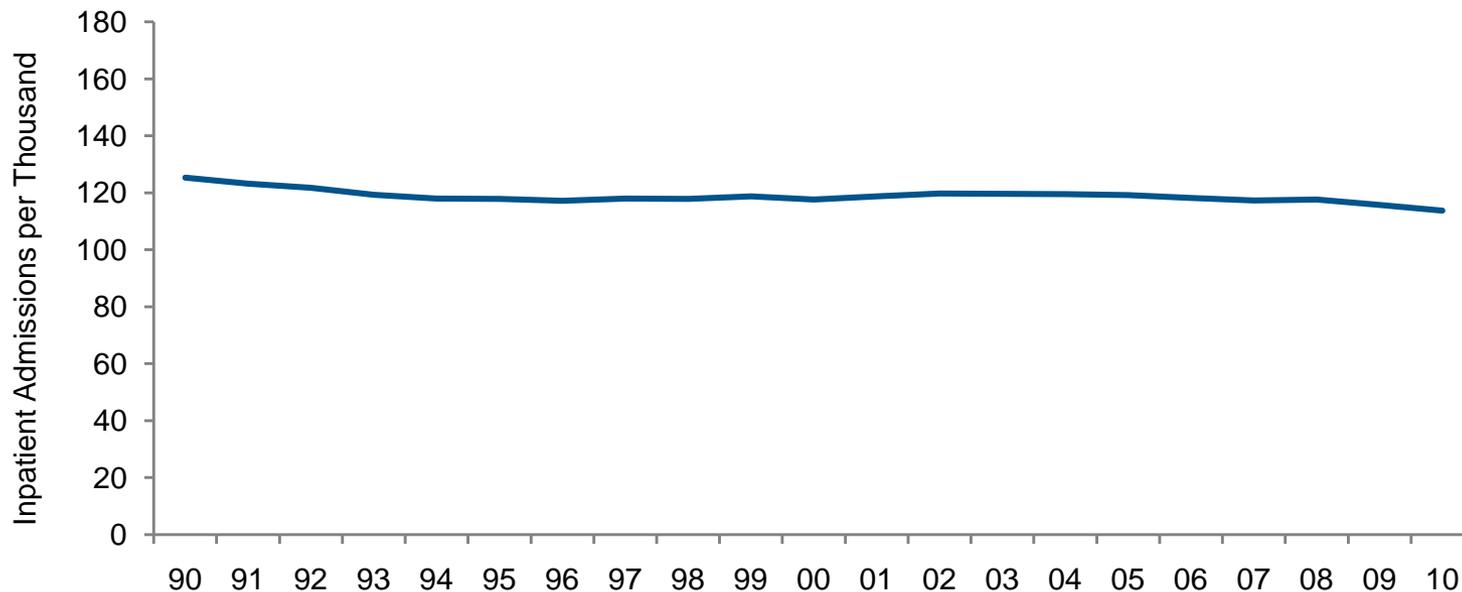
Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

### Chart 3.2: Total Inpatient Days in Community Hospitals, 1990 – 2010



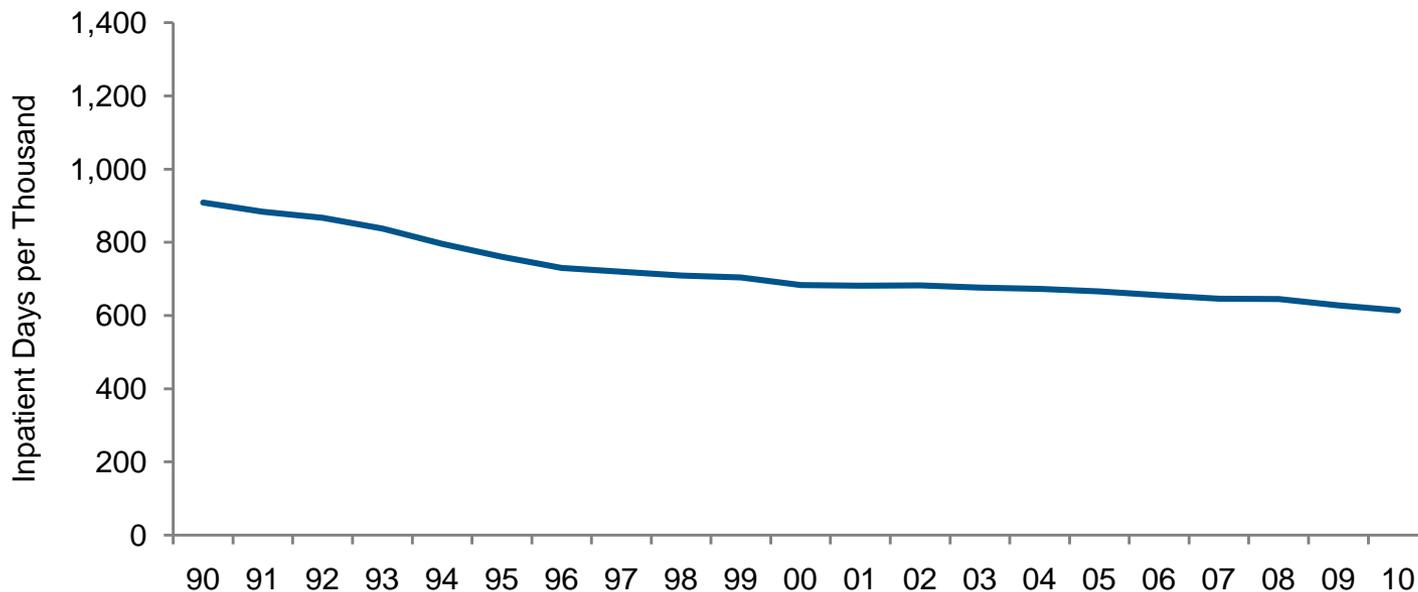
Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

### Chart 3.3: Inpatient Admissions per 1,000 Persons, 1990 – 2010



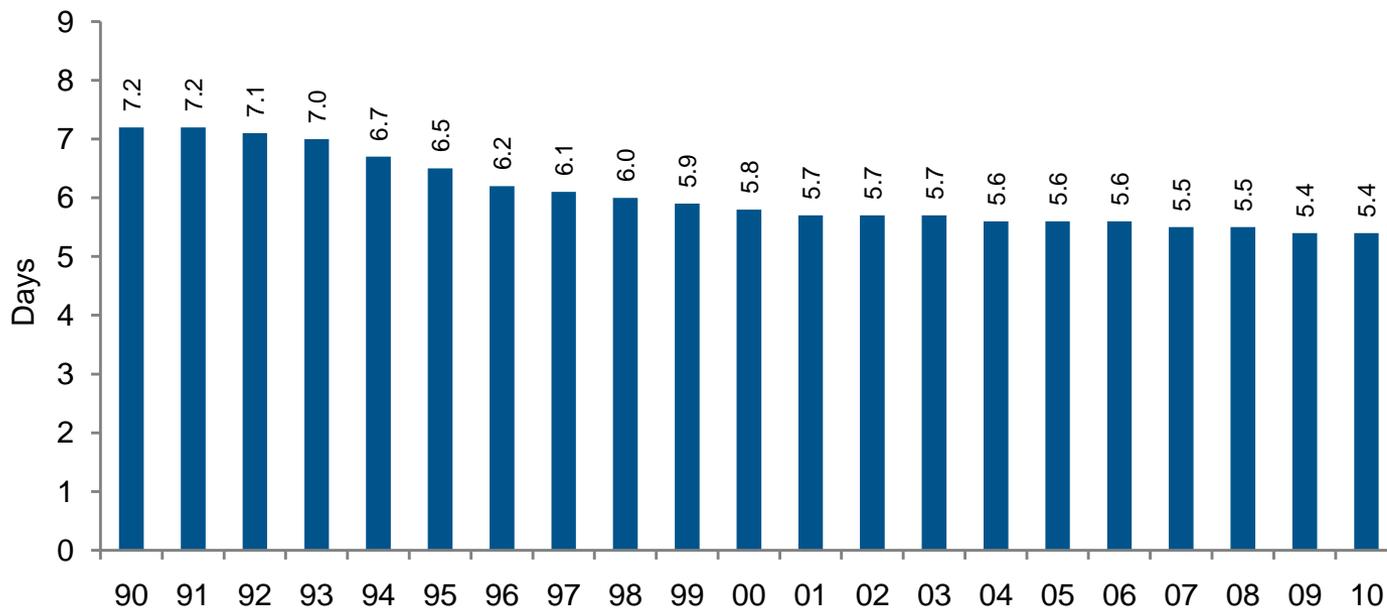
Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals. US Census Bureau: National and State Population Estimates, July 1, 2010.  
Link: <http://www.census.gov/popest/data/intercensal/state/state2010.html>.

### Chart 3.4: Inpatient Days per 1,000 Persons, 1990 – 2010



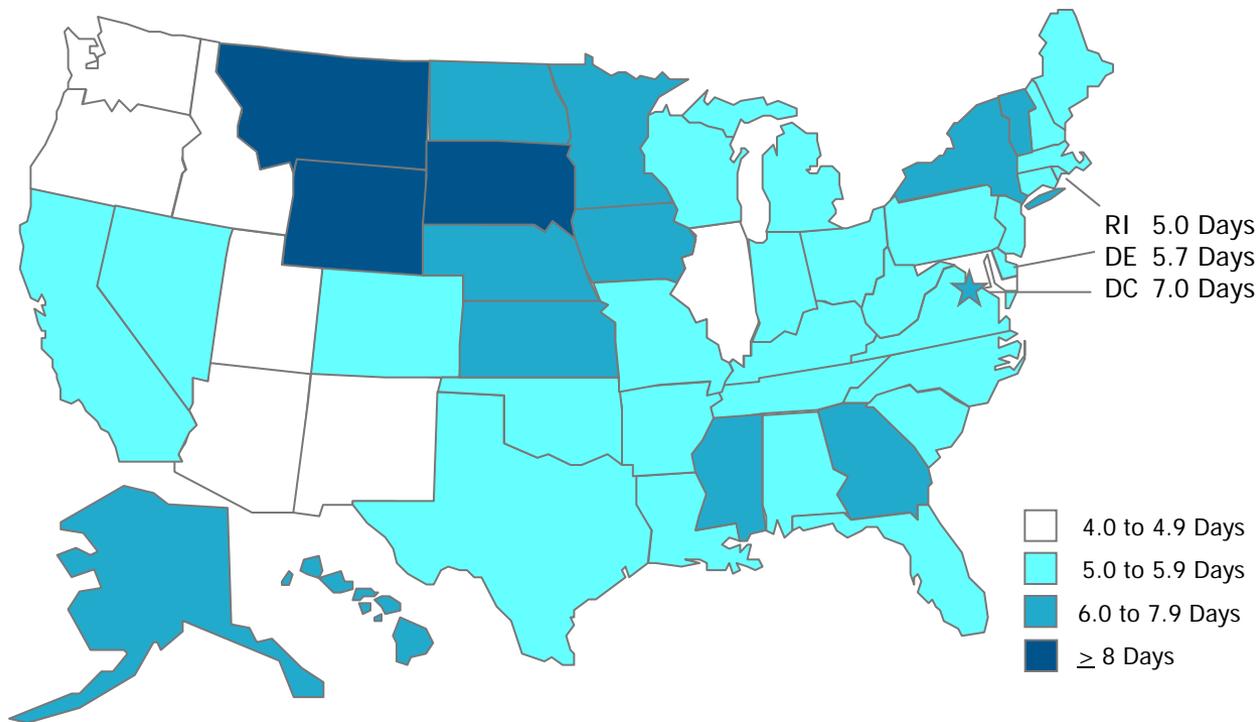
Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals. US Census Bureau: National and State Population Estimates, July 1, 2010.  
Link: <http://www.census.gov/popest/data/intercensal/state/state2010.html>.

### Chart 3.5: Average Length of Stay in Community Hospitals, 1990 – 2010



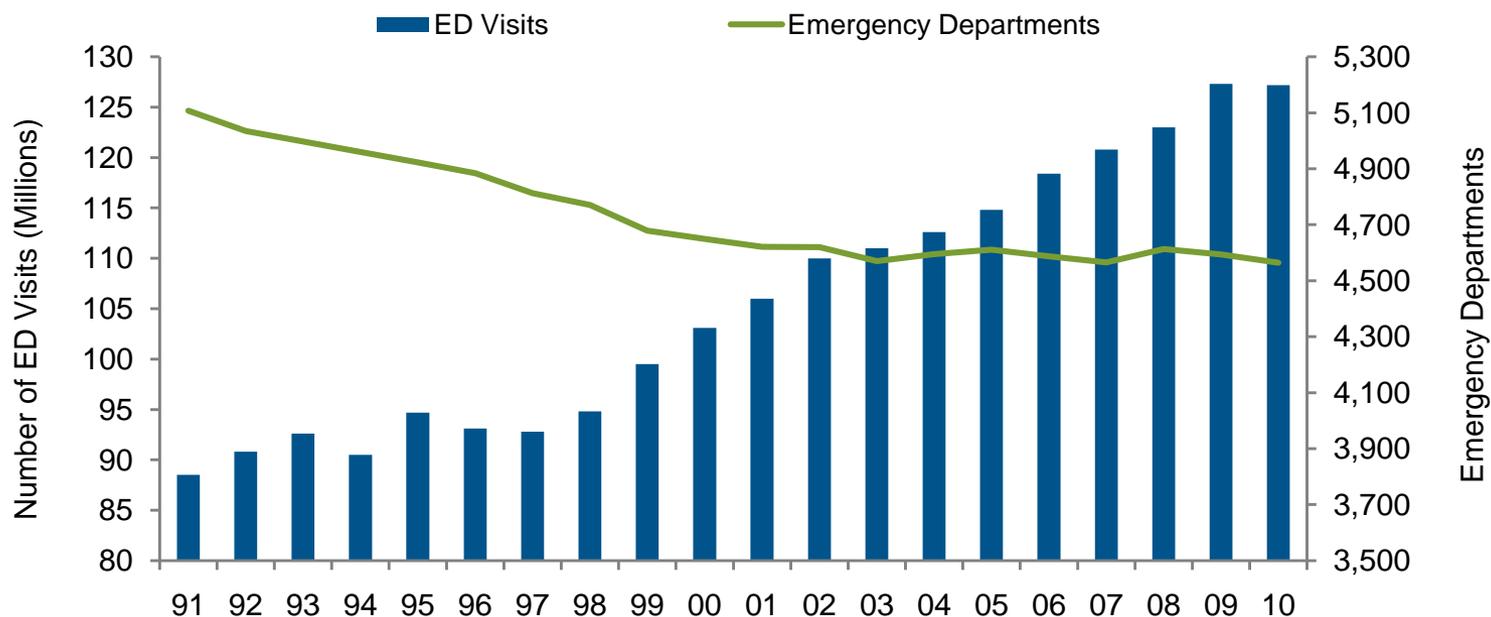
Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

### Chart 3.6: Average Length of Stay in Community Hospitals by State, 2010



Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

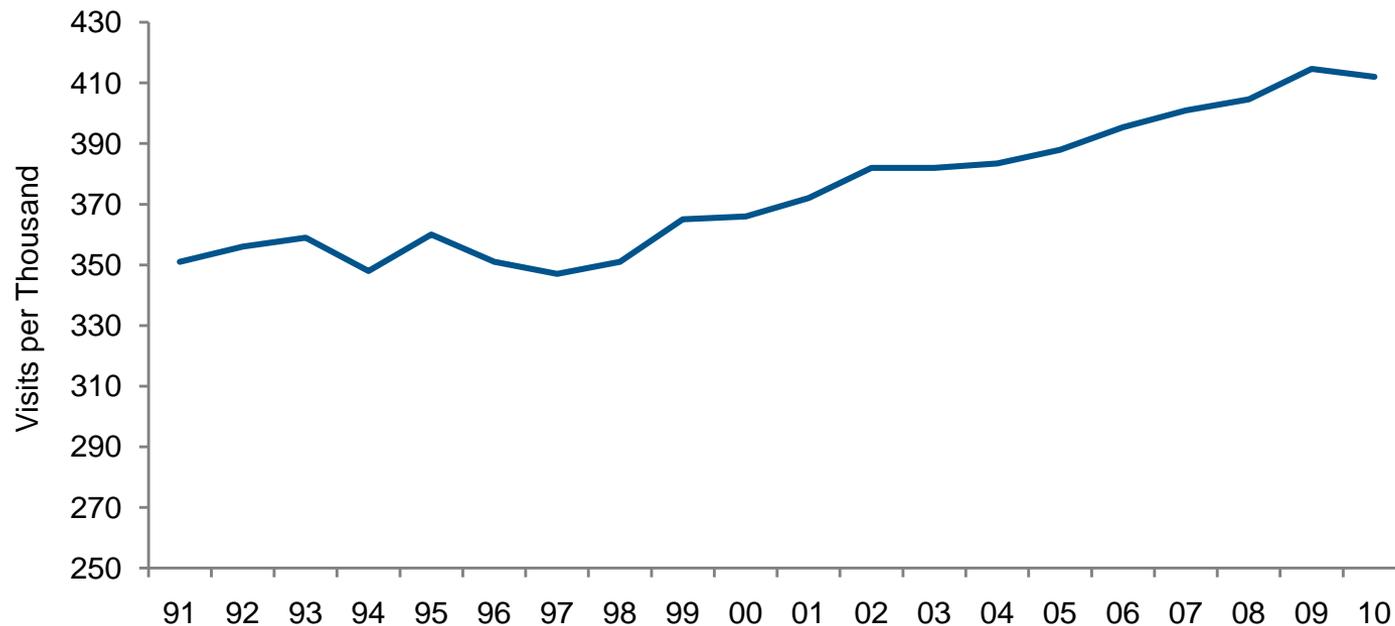
Chart 3.7: Emergency Department Visits and Emergency Departments<sup>(1)</sup> in Community Hospitals, 1991 – 2010



Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

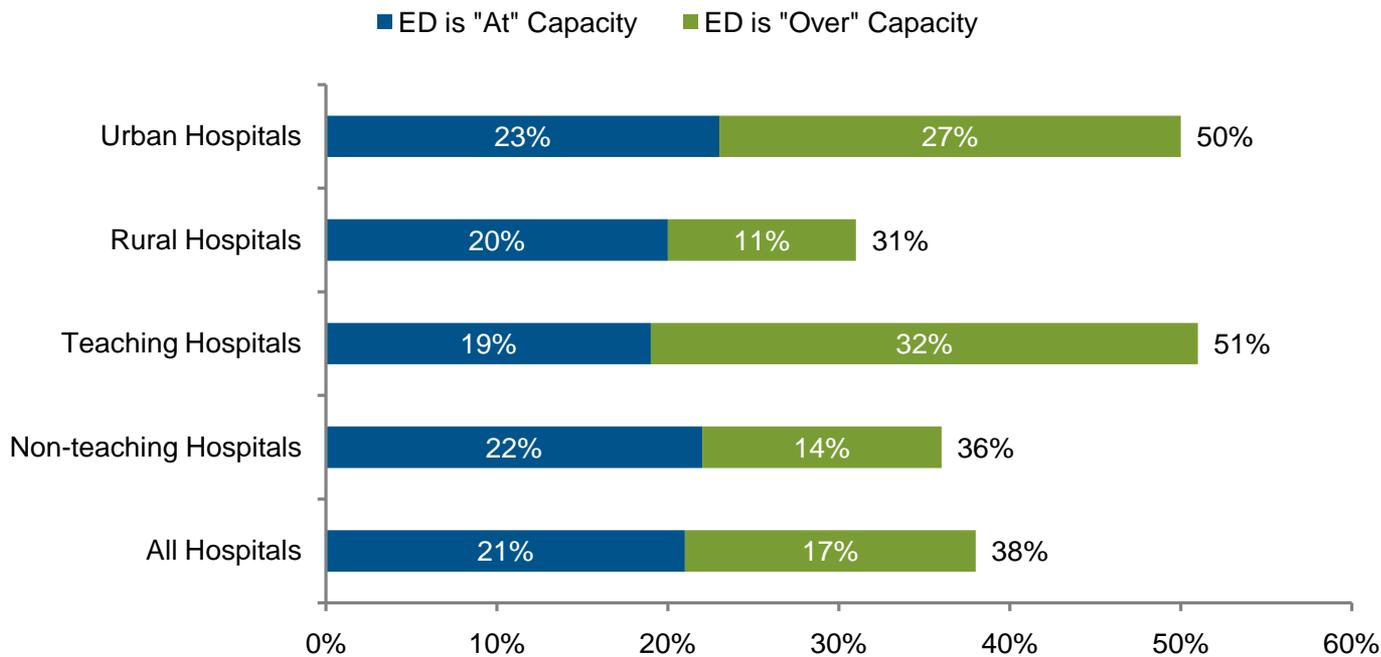
<sup>(1)</sup> Defined as hospitals reporting ED visits in the AHA Annual Survey.

### Chart 3.8: Hospital Emergency Department Visits per 1,000 Persons, 1991 – 2010



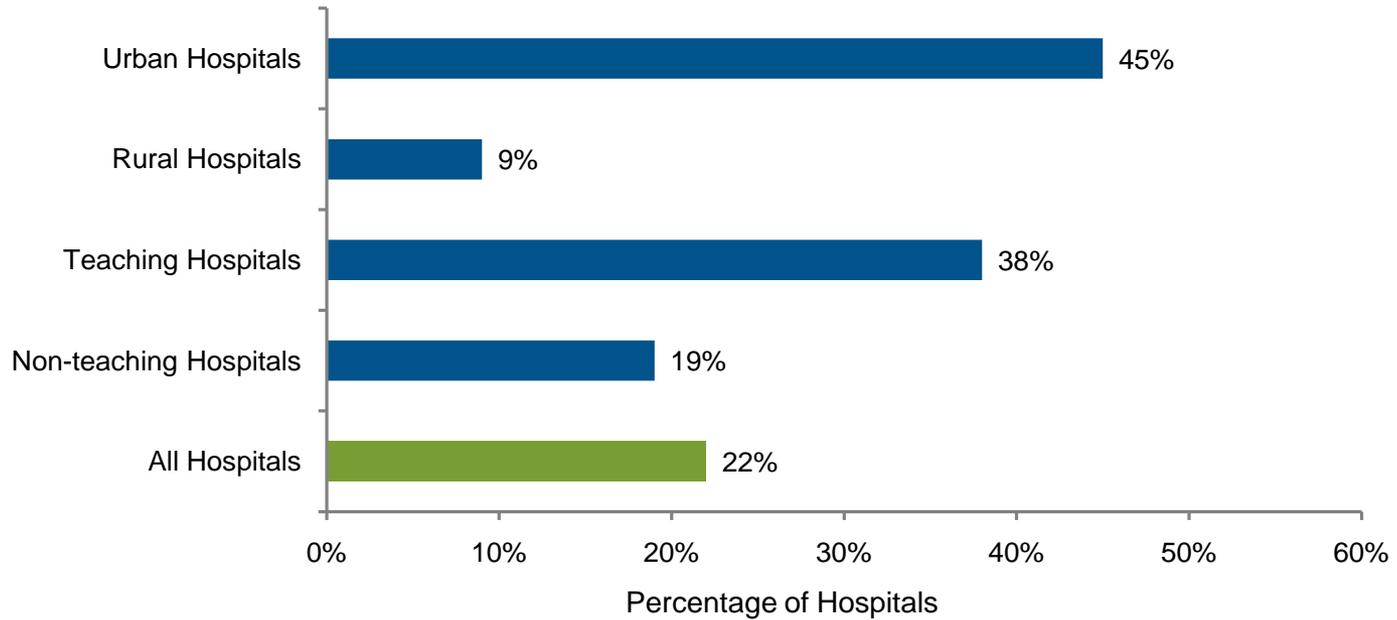
Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals. US Census Bureau: National and State Population Estimates, July 1, 2010.  
Link: <http://www.census.gov/popest/data/intercensal/state/state2010.html>.

### Chart 3.9: Percent of Hospitals Reporting Emergency Department Capacity Issues by Type of Hospital, March 2010



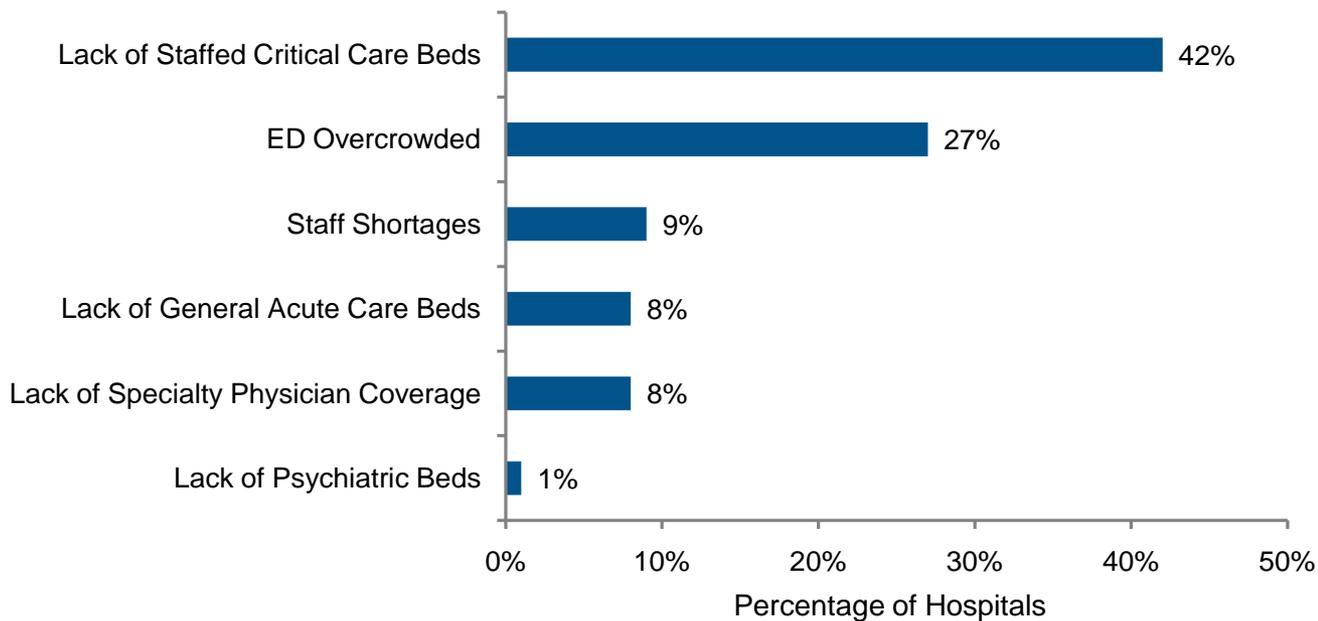
Source: American Hospital Association 2010 Rapid Response Survey: Telling the Hospital Story.

### Chart 3.10: Percent of Hospitals Reporting Time on Ambulance Diversion in Last 12 Months, March 2010



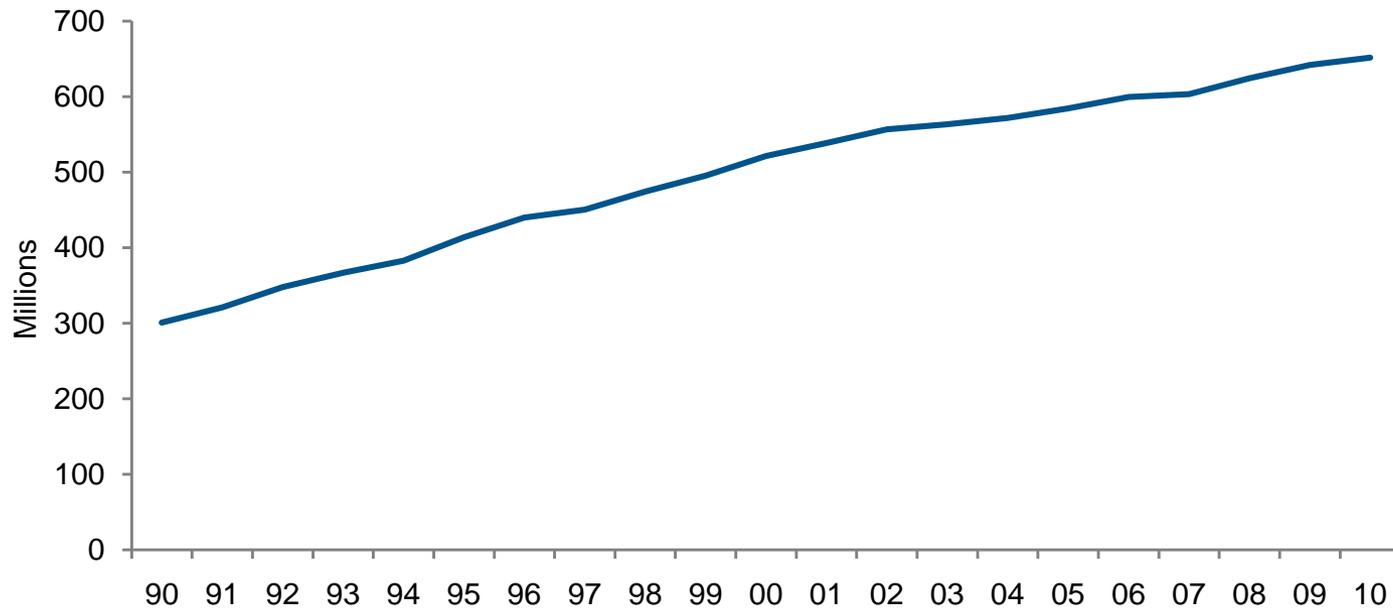
Source: American Hospital Association 2010 Rapid Response Survey: Telling the Hospital Story.

### Chart 3.11: Conditions Hospitals Reported as Number One Factor Contributing to Ambulance Diversions, March 2010



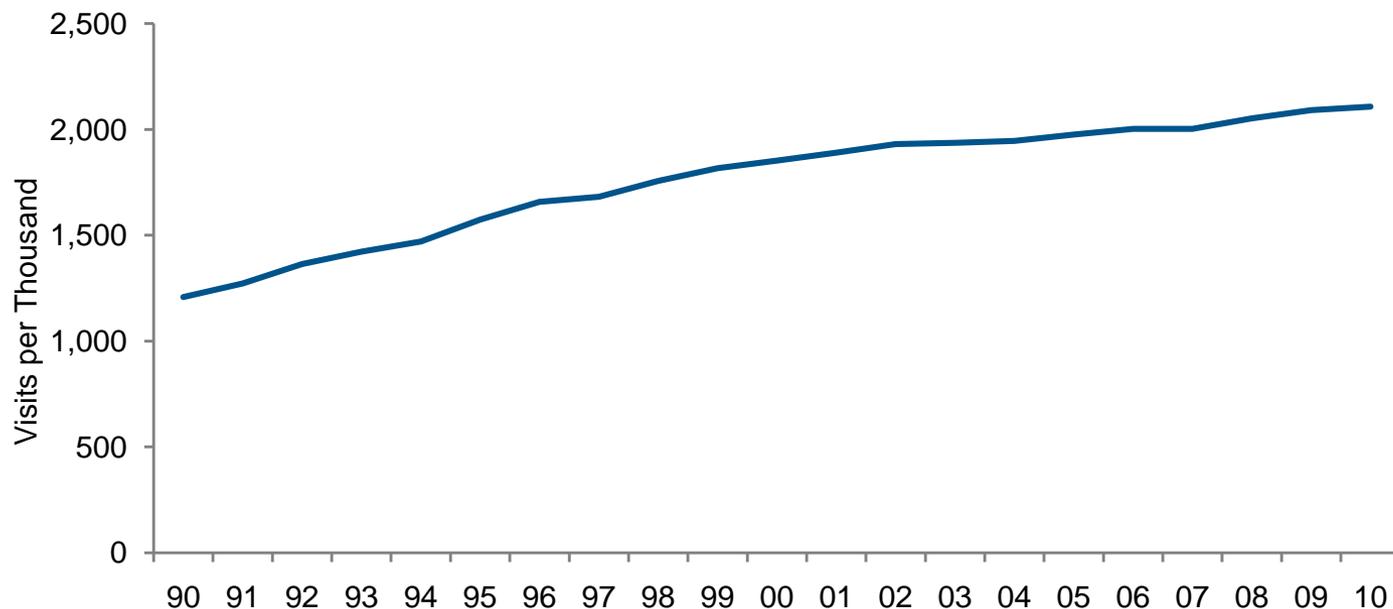
Source: American Hospital Association 2010 Rapid Response Survey: Telling the Hospital Story.

### Chart 3.12: Total Hospital Outpatient Visits in Community Hospitals, 1990 – 2010



Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

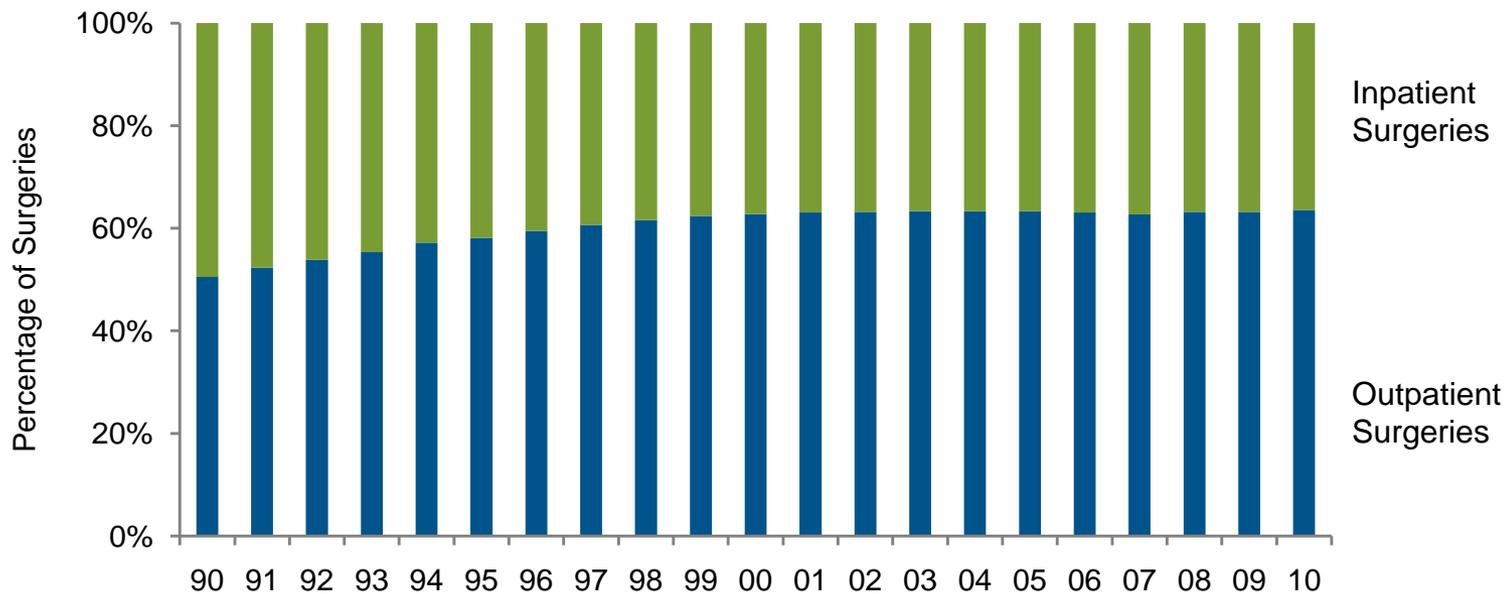
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Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals. US Census Bureau: National and State Population Estimates, July 1, 2010.

Link: <http://www.census.gov/popest/data/intercensal/state/state2010.html>.

### Chart 3.14: Percentage Share of Inpatient vs. Outpatient Surgeries, 1990 – 2010



Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.



# CHAPTER 4

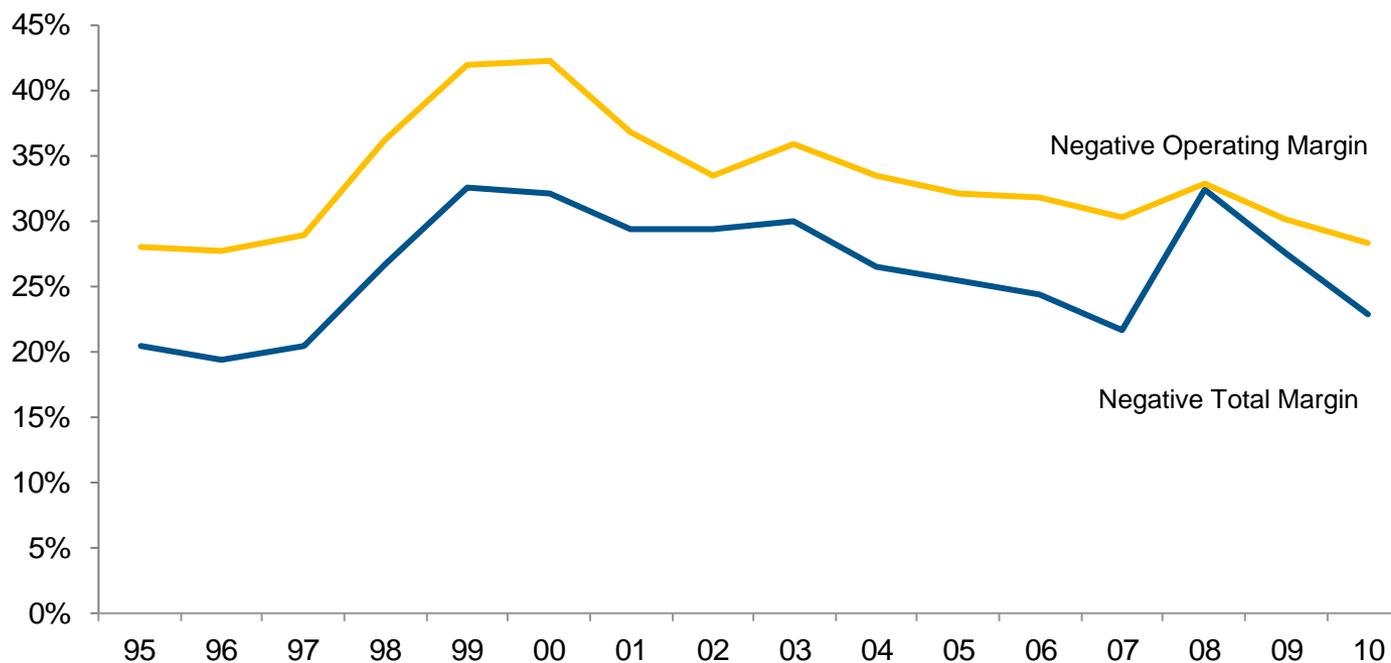
Trends in Hospital Financing

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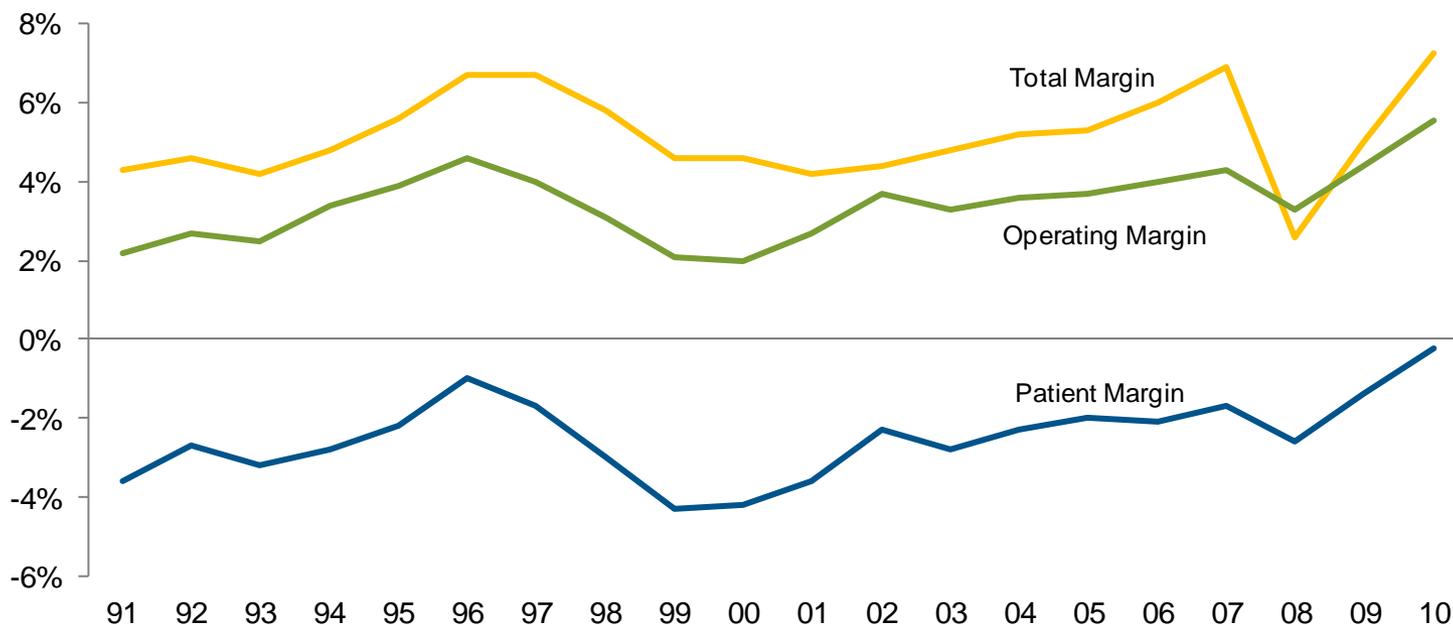
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Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

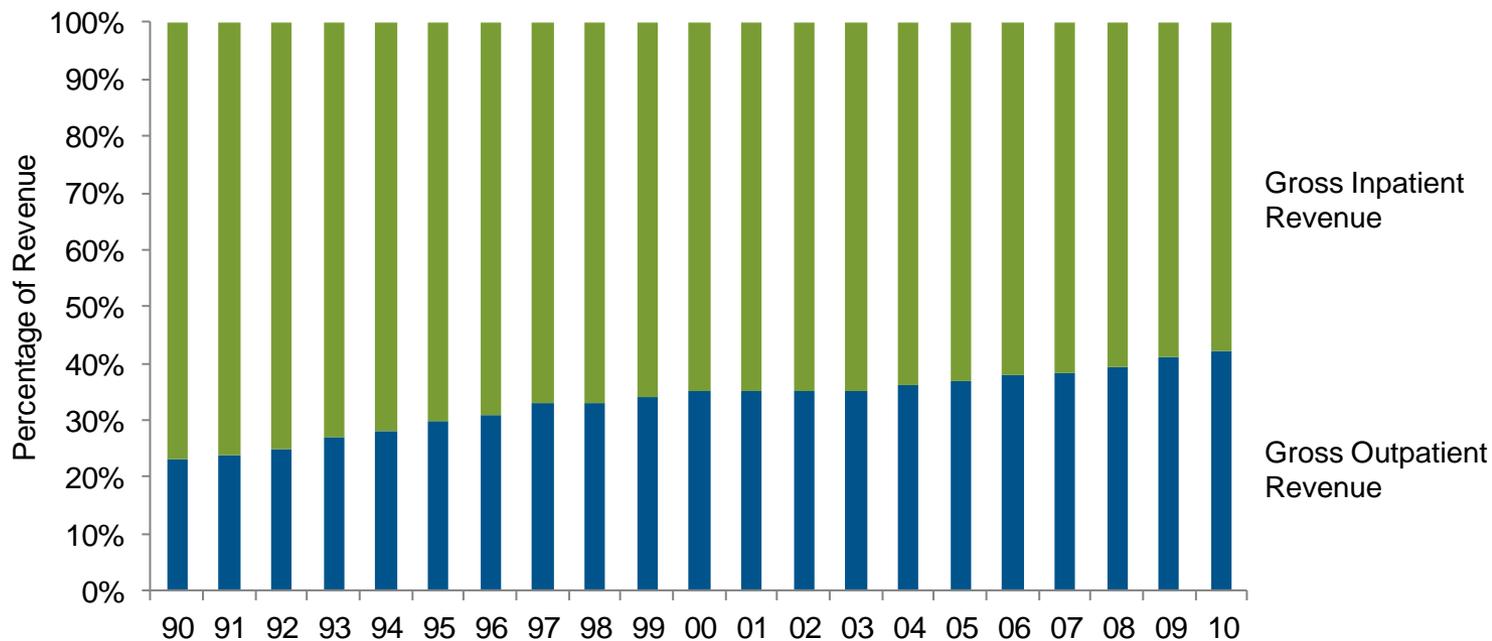
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Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

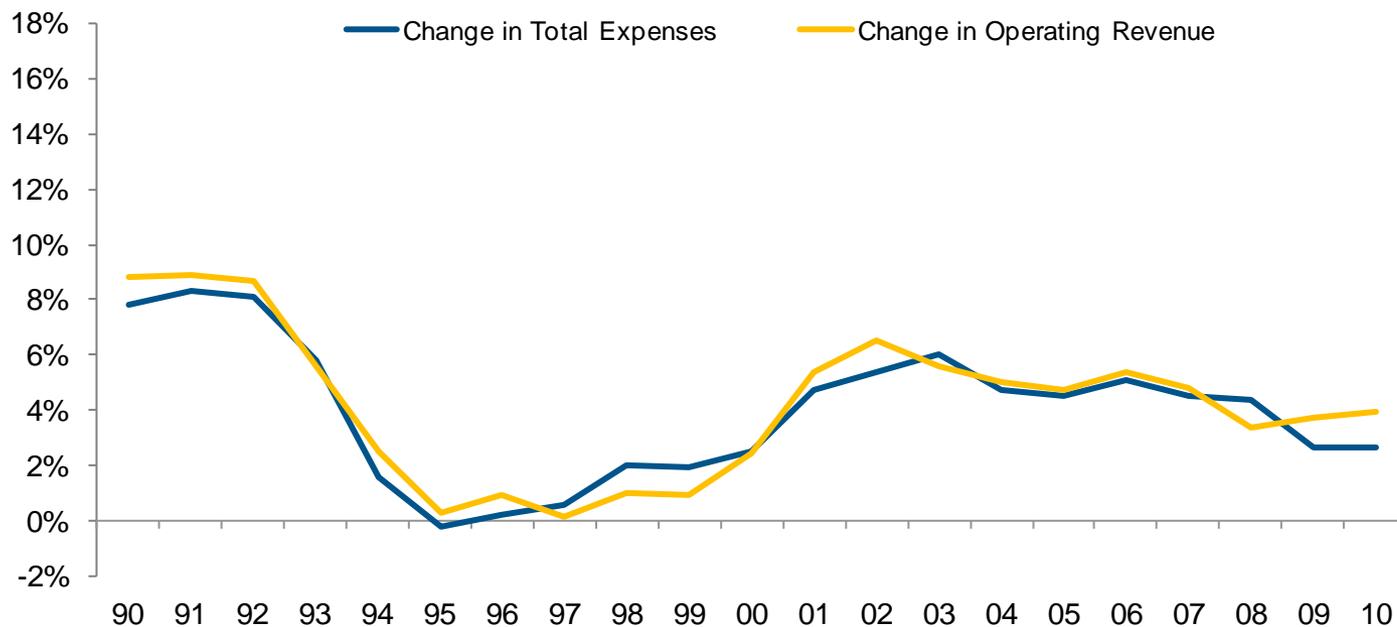
- (1) Total Hospital Margin is calculated as the difference between total net revenue and total expenses divided by total net revenue.
- (2) Operating Margin is calculated as the difference between operating revenue and total expenses divided by operating revenue.
- (3) Patient Margin is calculated as the difference between net patient revenue and total expenses divided by net patient revenue.

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Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

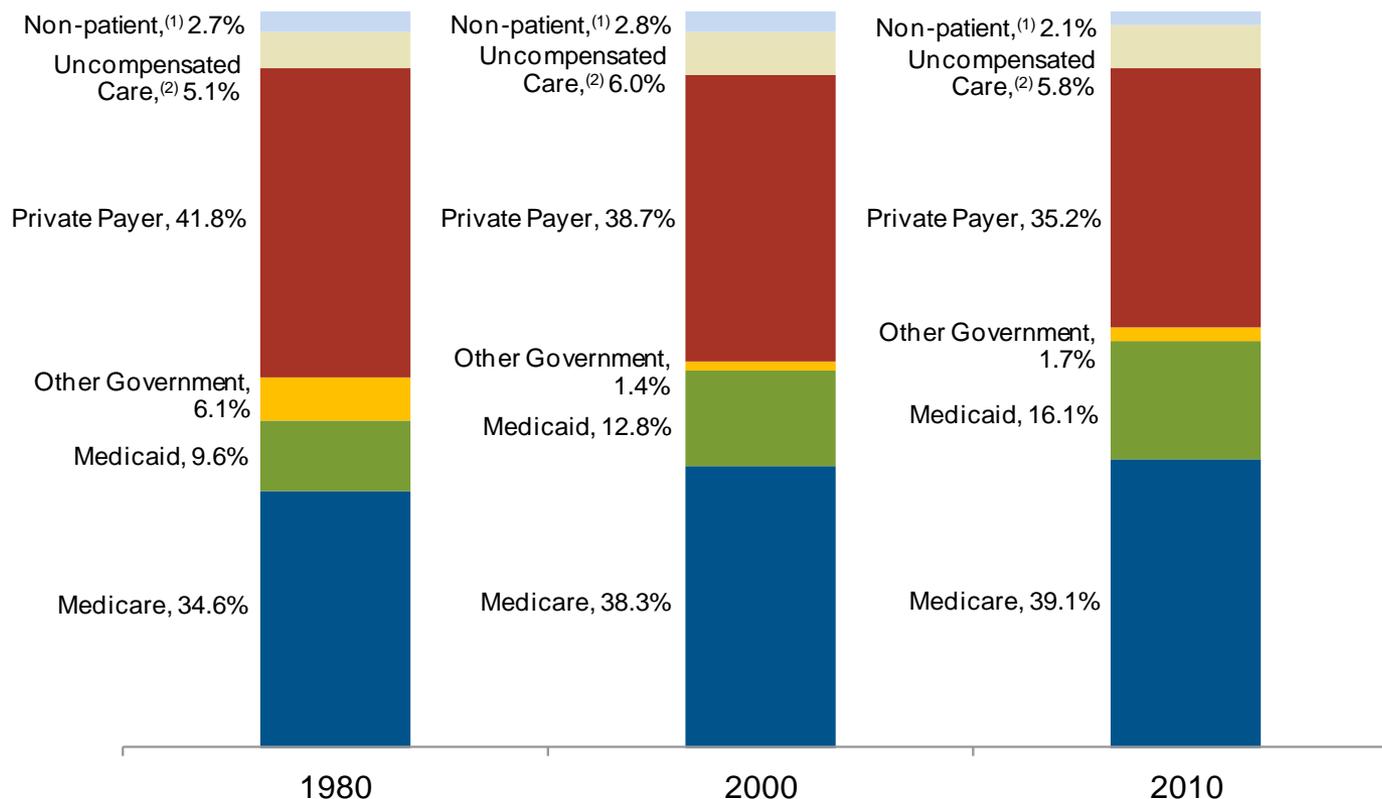
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Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

<sup>(1)</sup> An aggregate measure of workload reflecting the number of inpatient admissions, plus an estimate of the volume of outpatient services, expressed in units equivalent to an inpatient admission in terms of level of effort.

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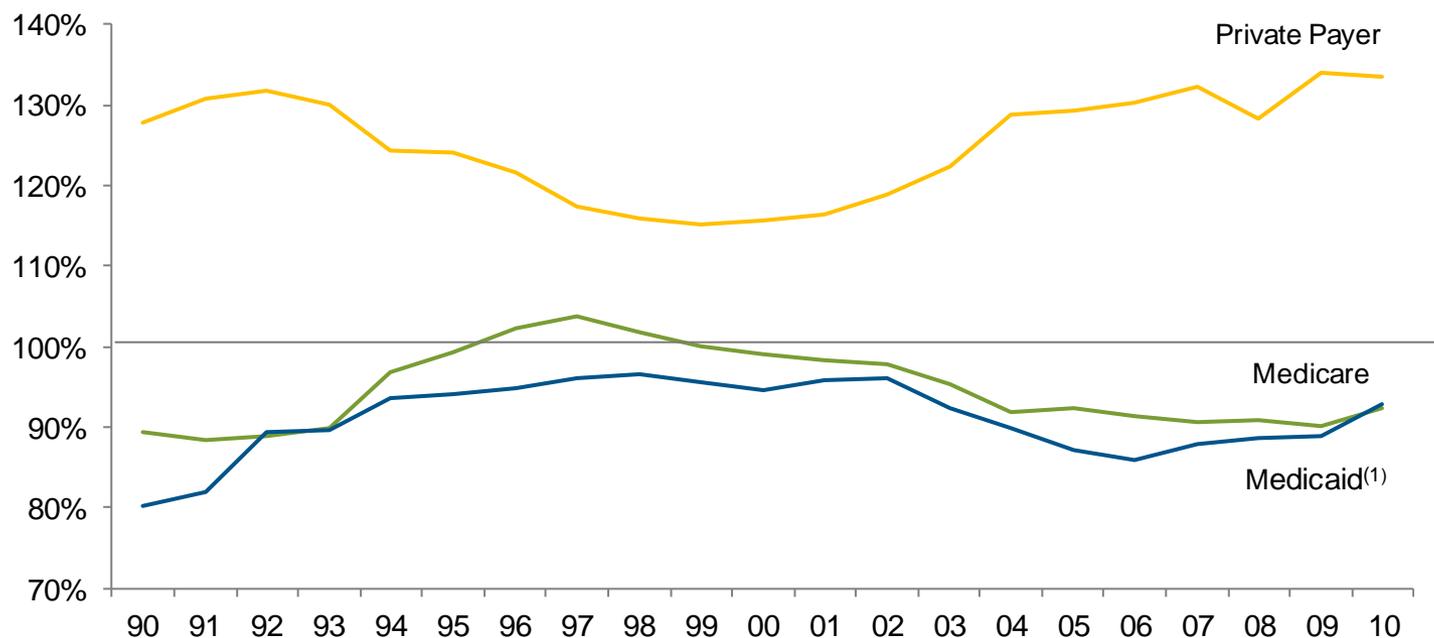


Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

<sup>(1)</sup> Non-patient represents costs for cafeterias, parking lots, gift shops and other non-patient care operating services and are not attributed to any one payer.

<sup>(2)</sup> Uncompensated care represents bad debt expense and charity care, at cost.

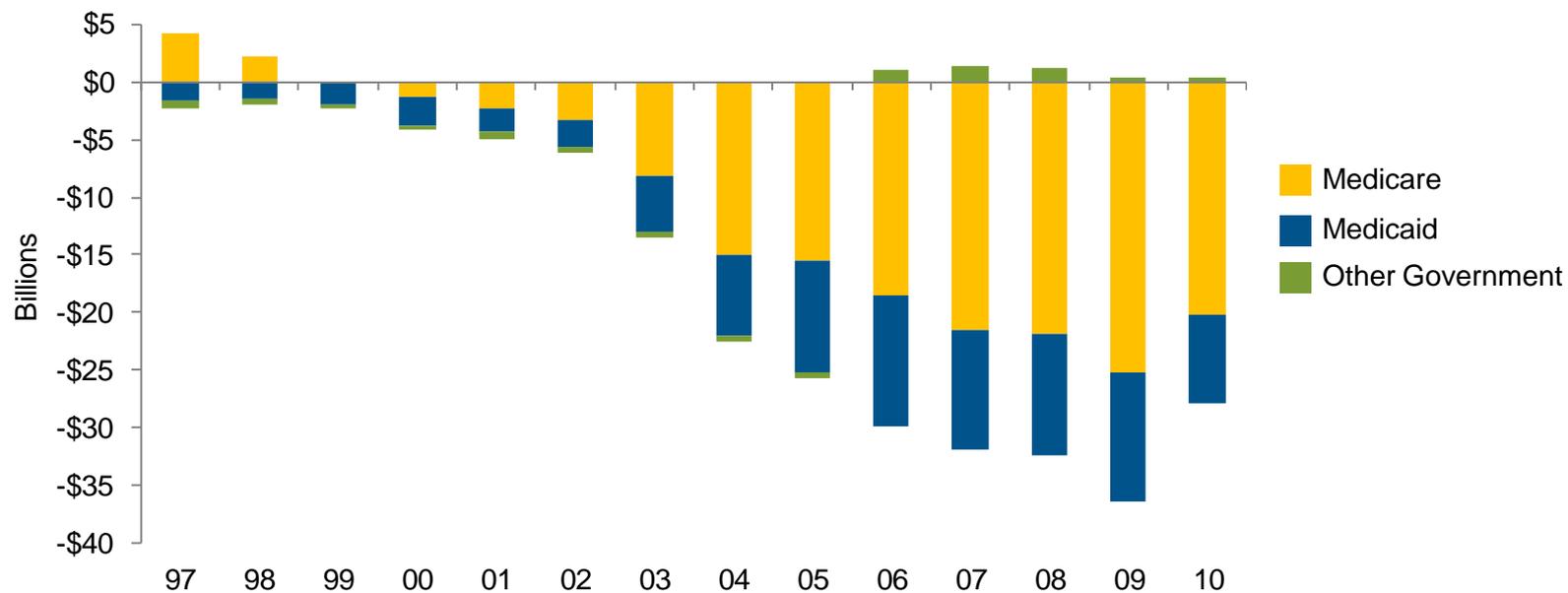
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Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

<sup>(1)</sup> Includes Medicaid Disproportionate Share payments.

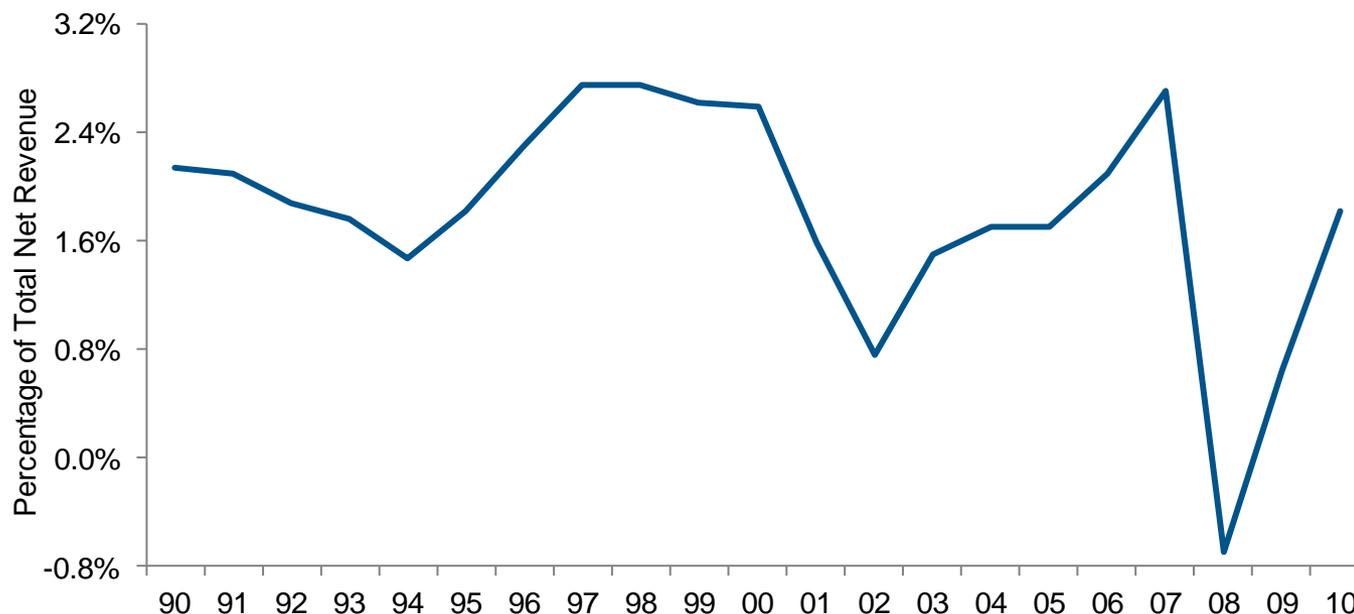
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Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

<sup>(1)</sup> Costs reflect a cap of 1.0 on the cost-to-charge ratio.

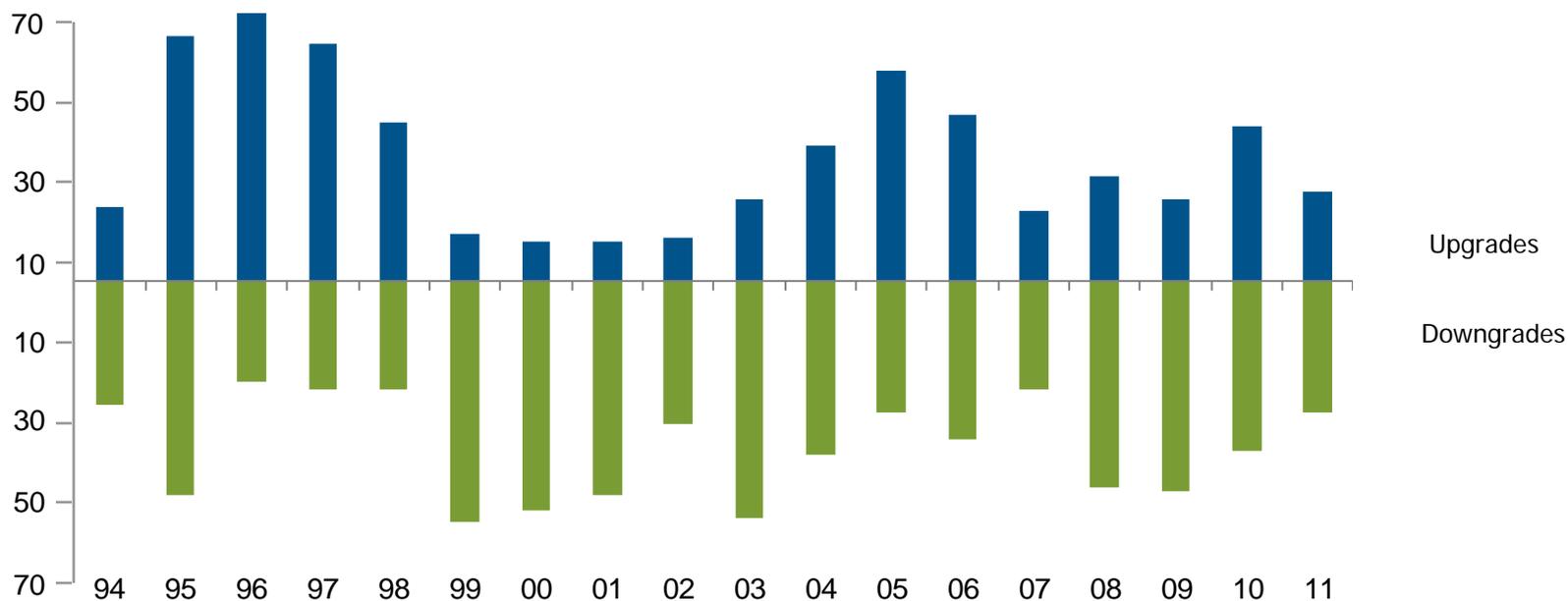
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Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

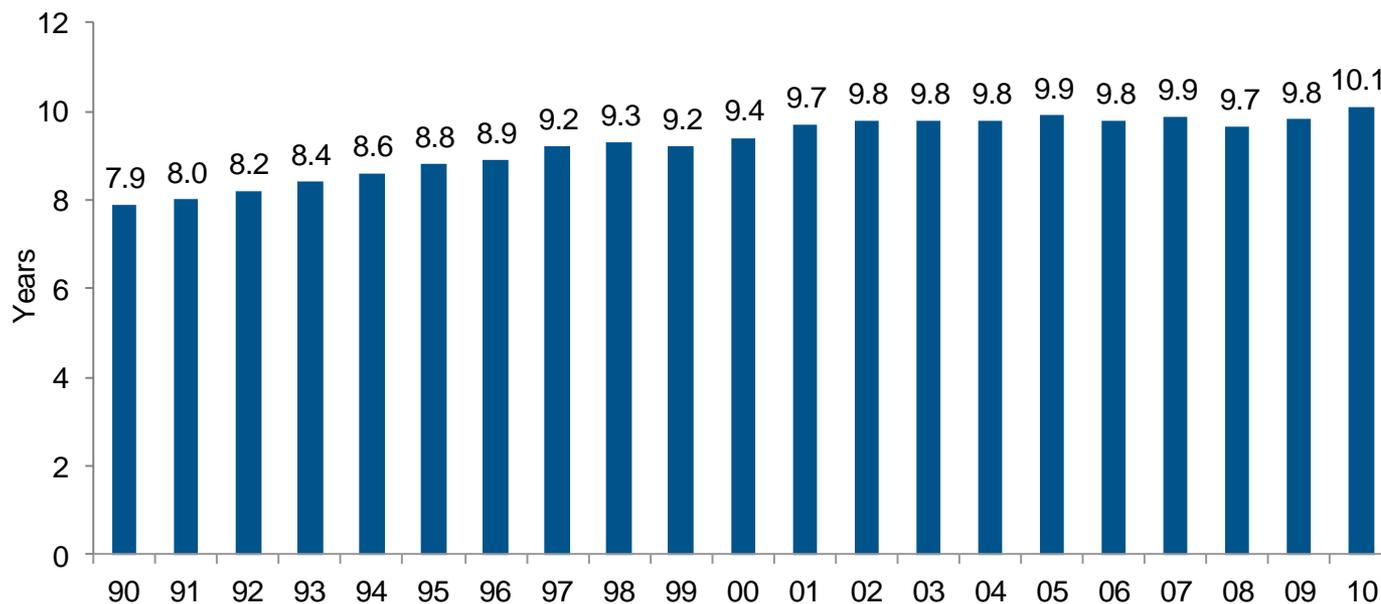
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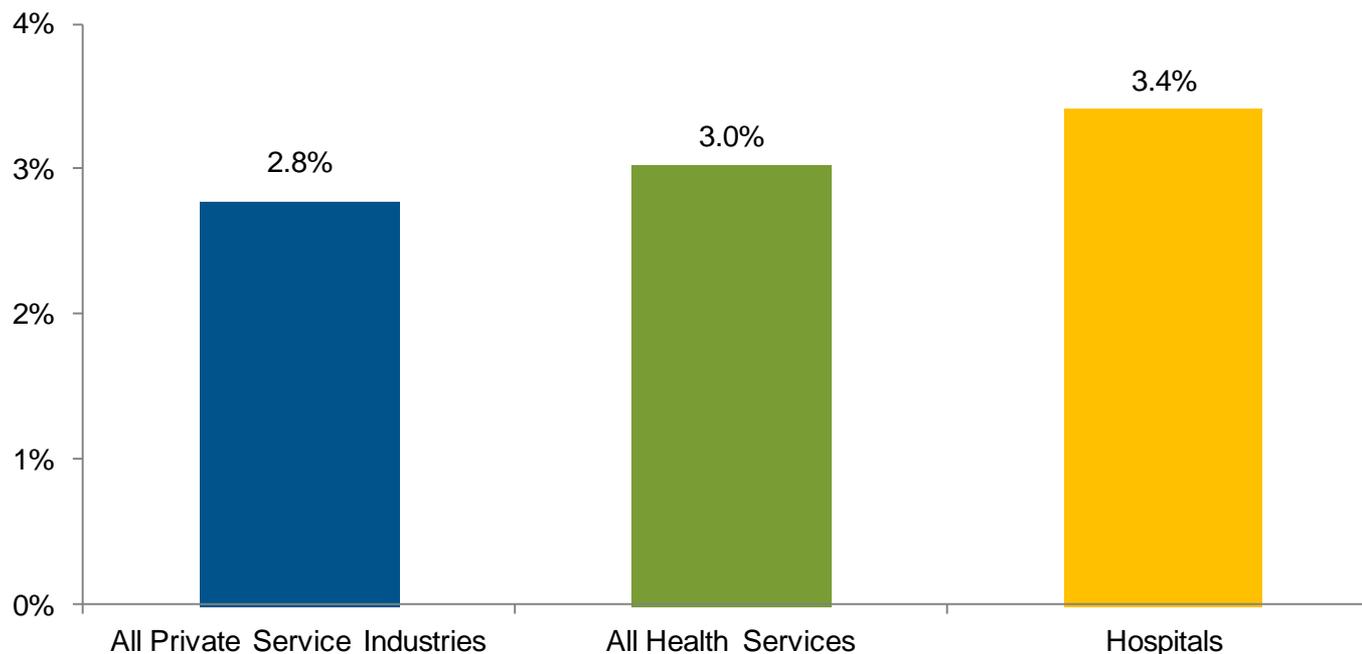
Source: Moody's Investors Services. *Moody's: US Not-for-profit Healthcare in 2011: Downgrades Still Outpace Upgrades*. February 2, 2012.

### Chart 4.10: Median Average Age of Plant, 1990 – 2010



Source: Ingenix, *Almanac of Hospital Financial and Operating Indicators*, 2005, 2008, 2009, 2010, 2011, and 2012 and CHIPS, *The Almanac of Hospital and Financial Operating Indicators*, 1994 and 1996-7.

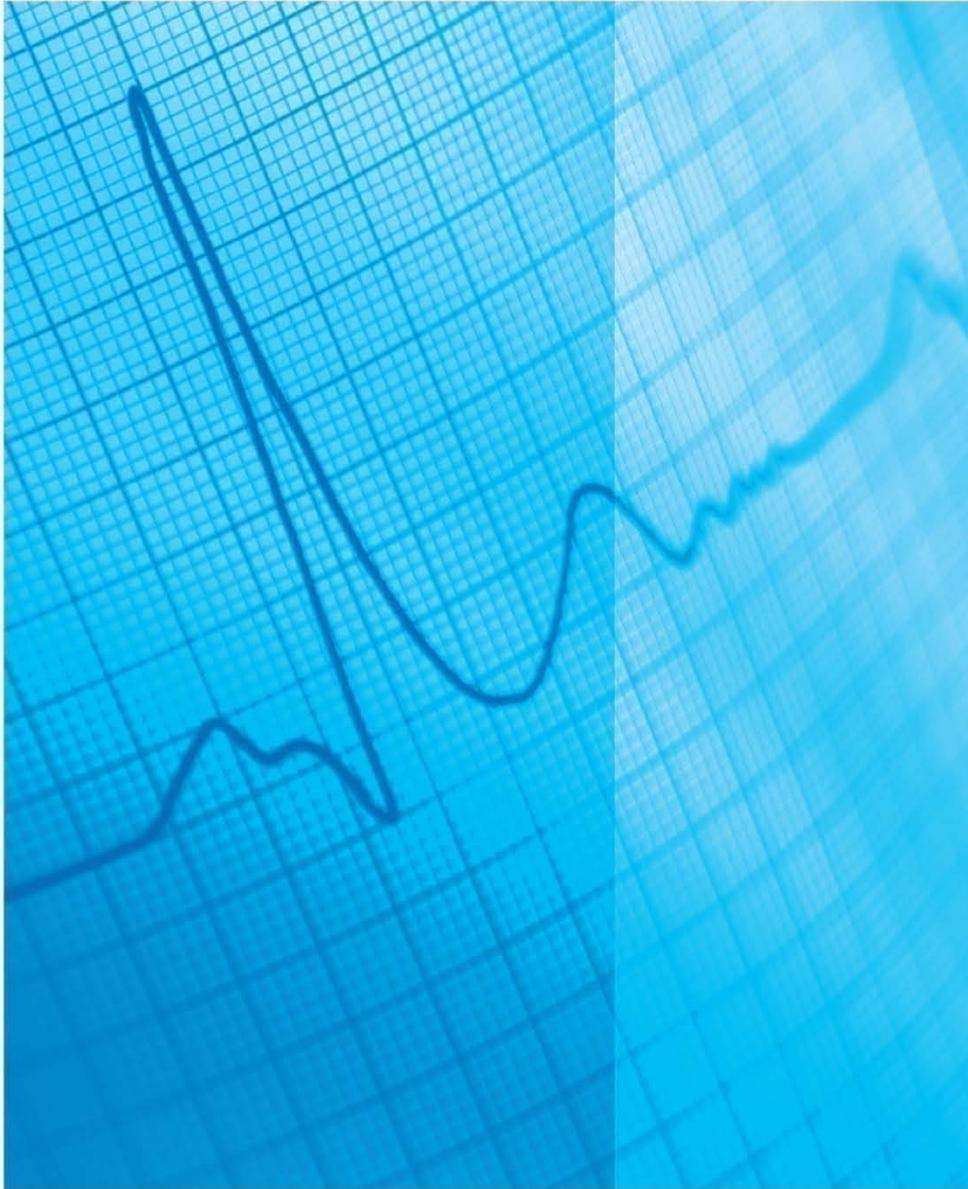
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Source: Bureau of Labor Statistics, Employment Cost Index, 12 months ending December 2011. Link: [www.bls.gov](http://www.bls.gov).

(1) Total compensation.

(2) Data represent ten-year average.



# CHAPTER 5

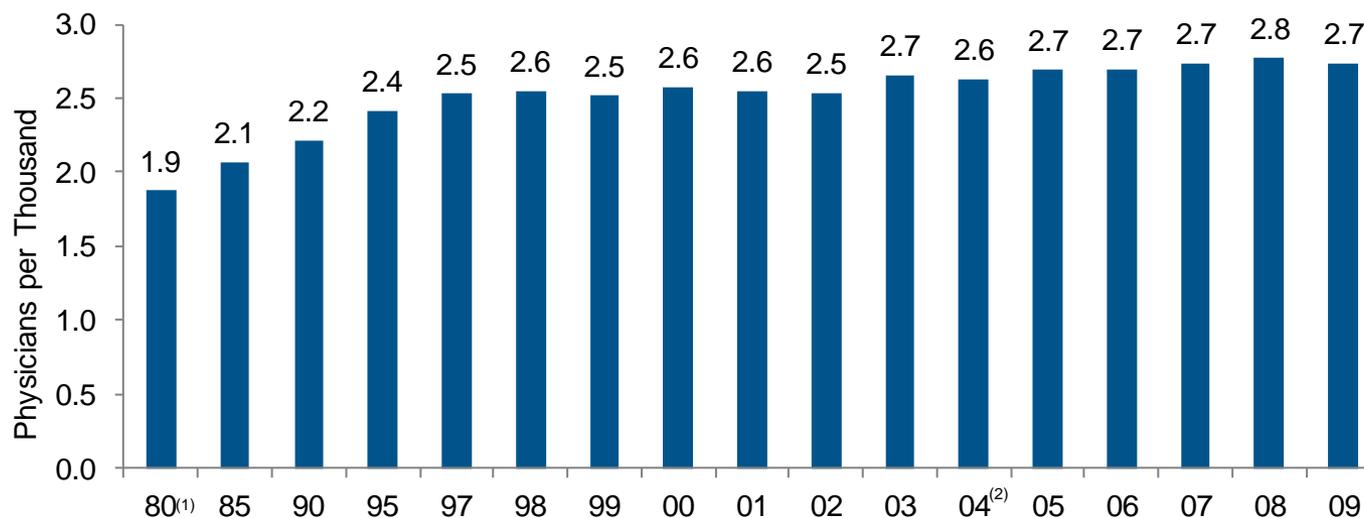
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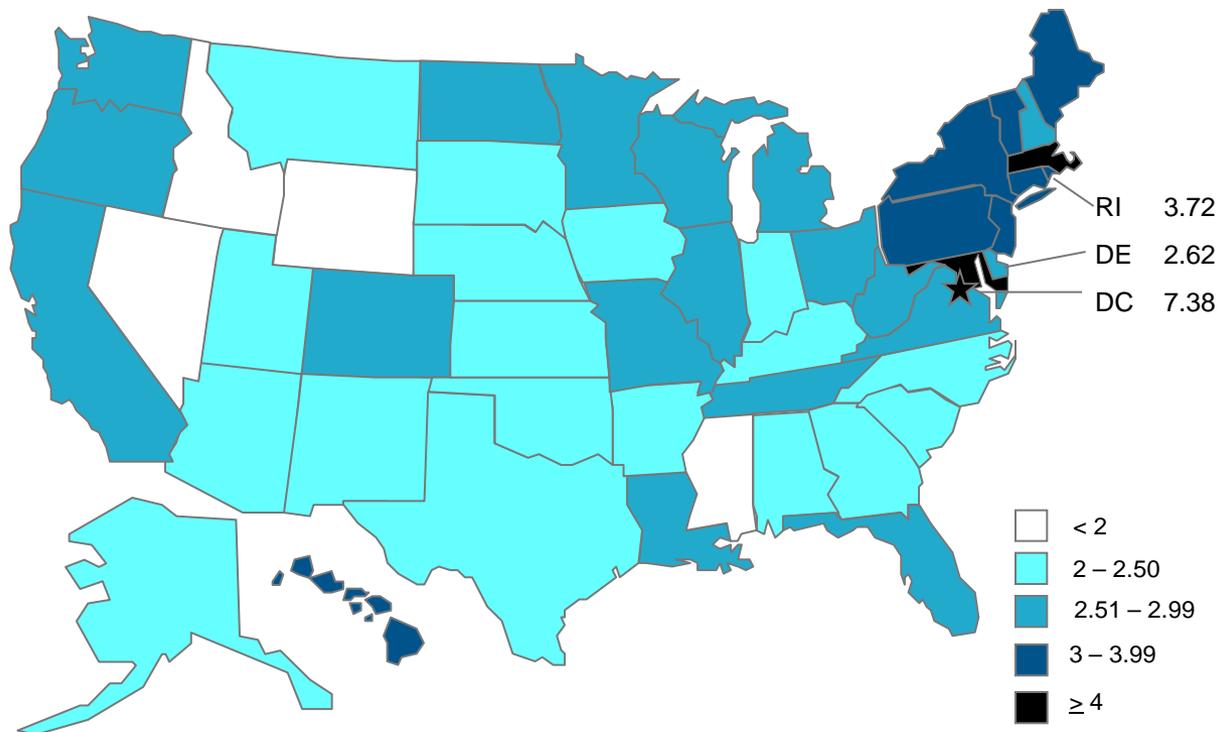


Source: National Center for Health Statistics. *Health, United States, 1982, 1996-97, 1999, 2000, 2001, 2002, 2003, 2004, 2005, 2006, 2007, 2008, 2009, 2010 and 2011*. Hyattsville, MD.

<sup>(1)</sup> 1980 does not include doctors of osteopathy.

<sup>(2)</sup> 2004 and later years include both federal and non-federal physicians. Prior to 2003, data included non-federal physicians only.

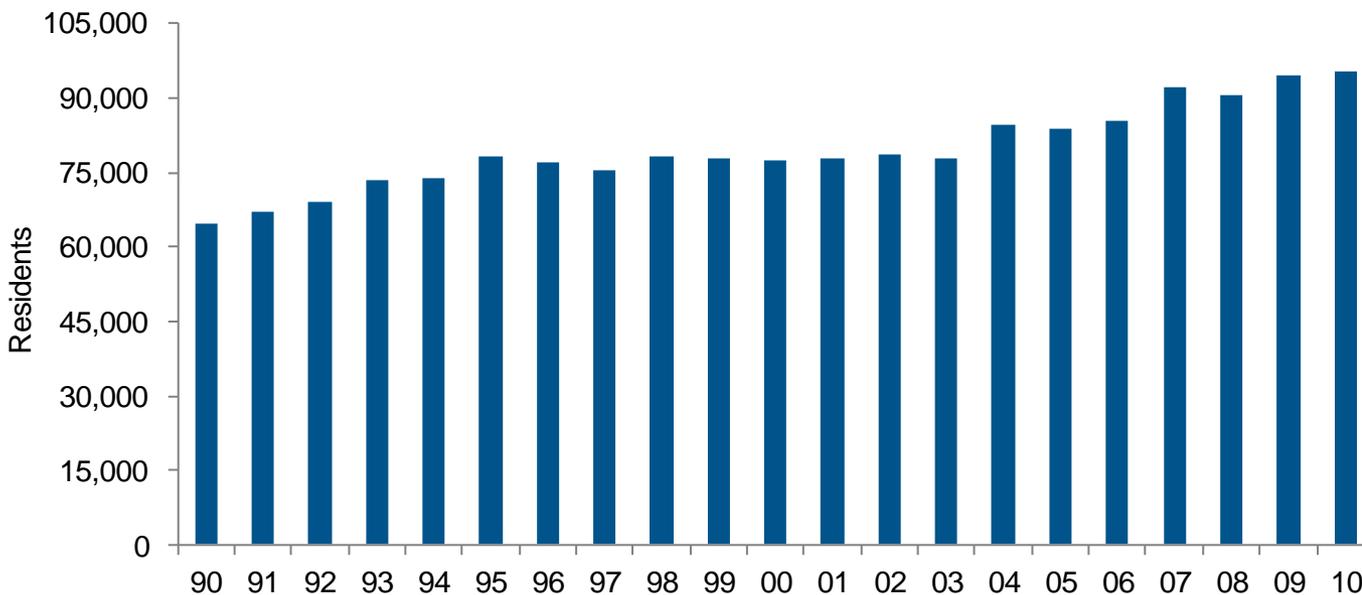
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Source: National Center for Health Statistics. (2012). *Health, United States, 2011*. Hyattsville, MD.

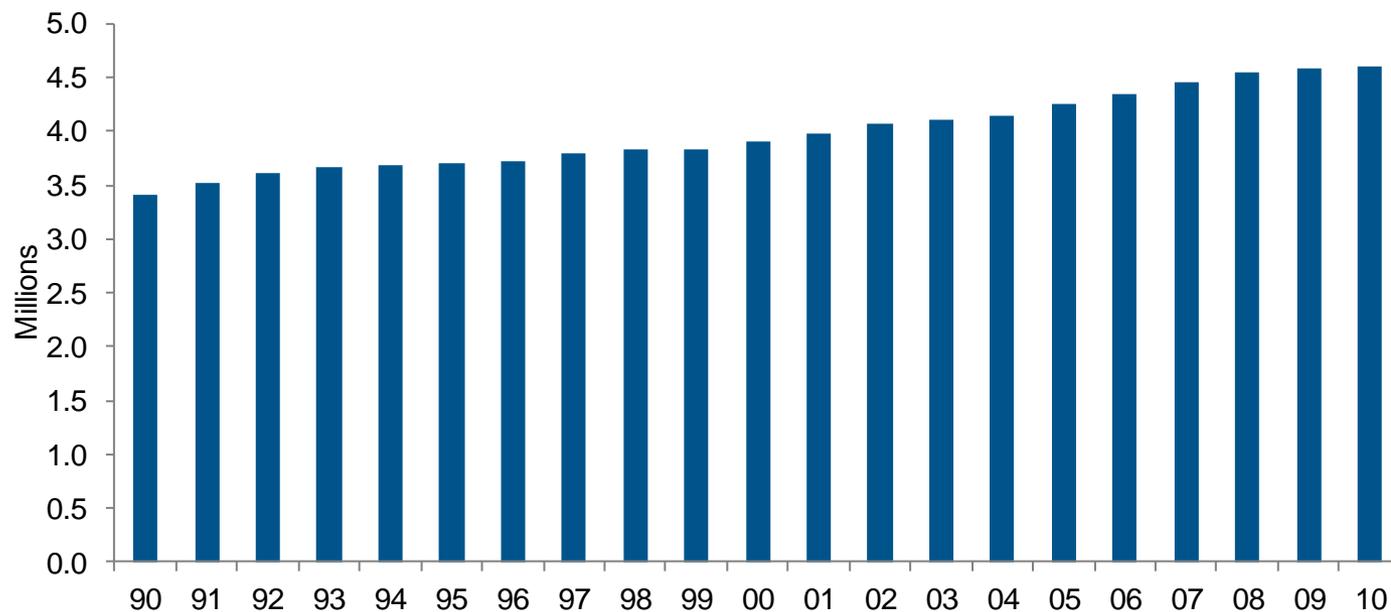
<sup>(1)</sup> Includes active federal and non-federal doctors of medicine and active doctors of osteopathy.

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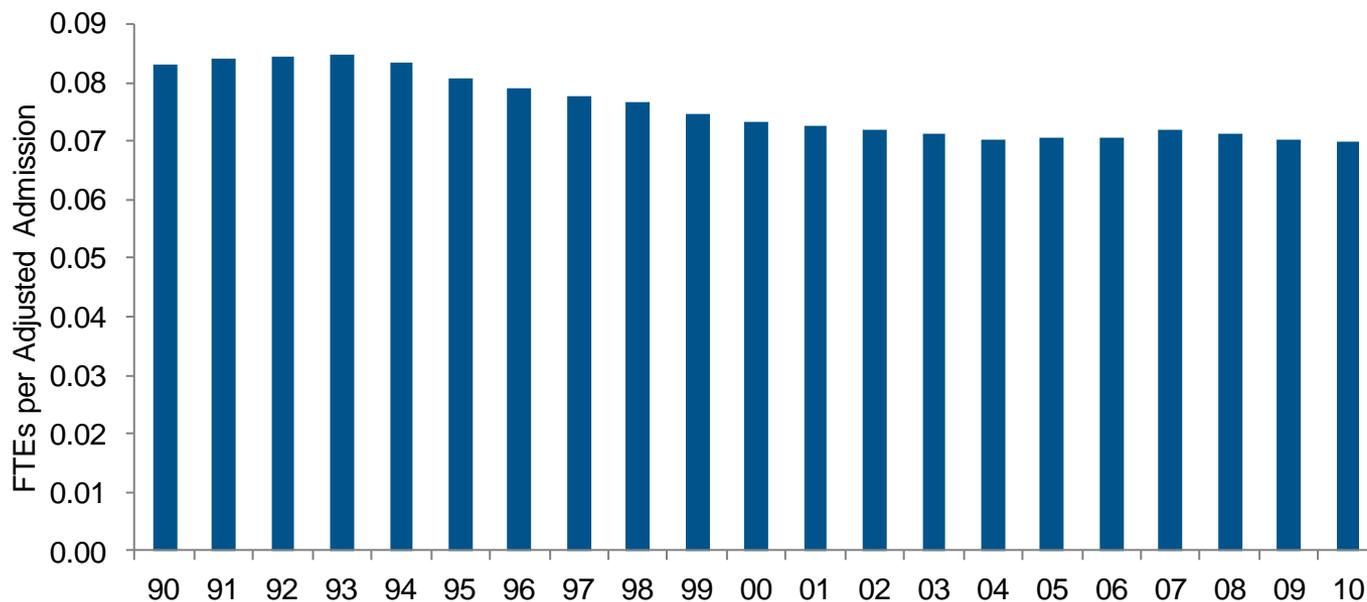
Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

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Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

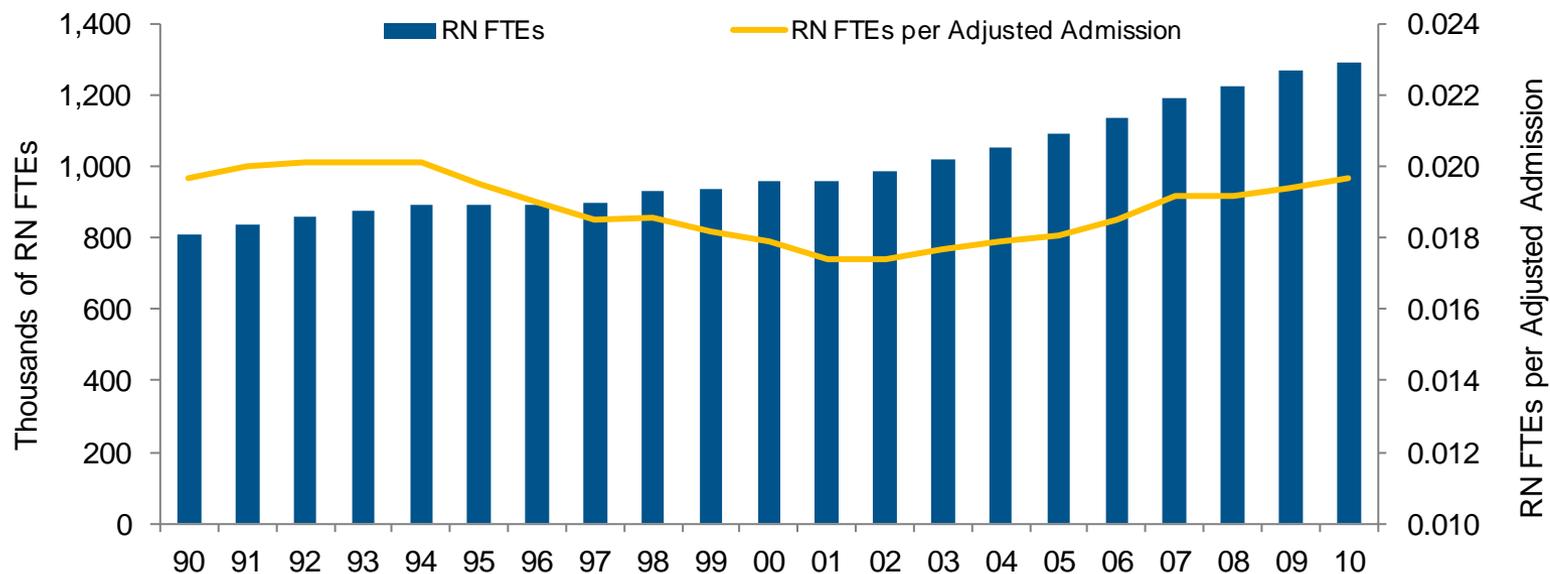
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Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

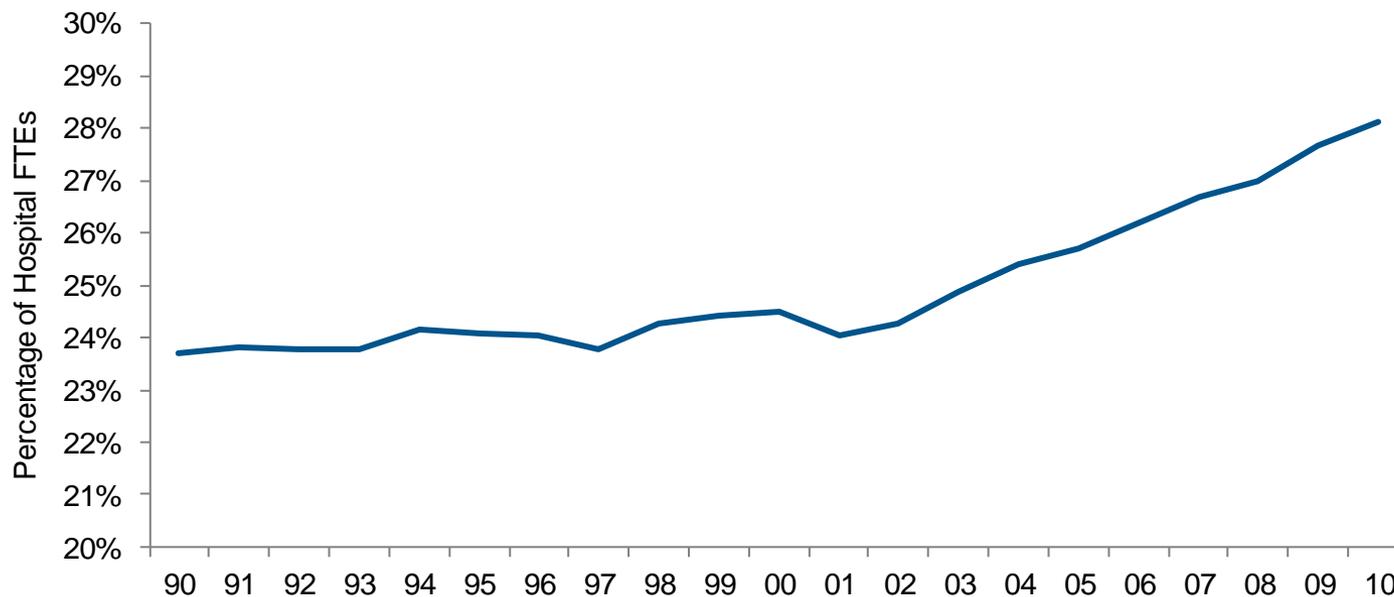
<sup>(1)</sup> An aggregate measure of workload reflecting the number of inpatient admissions, plus an estimate of the volume of outpatient services, expressed in units equivalent to an inpatient admission in terms of level of effort.

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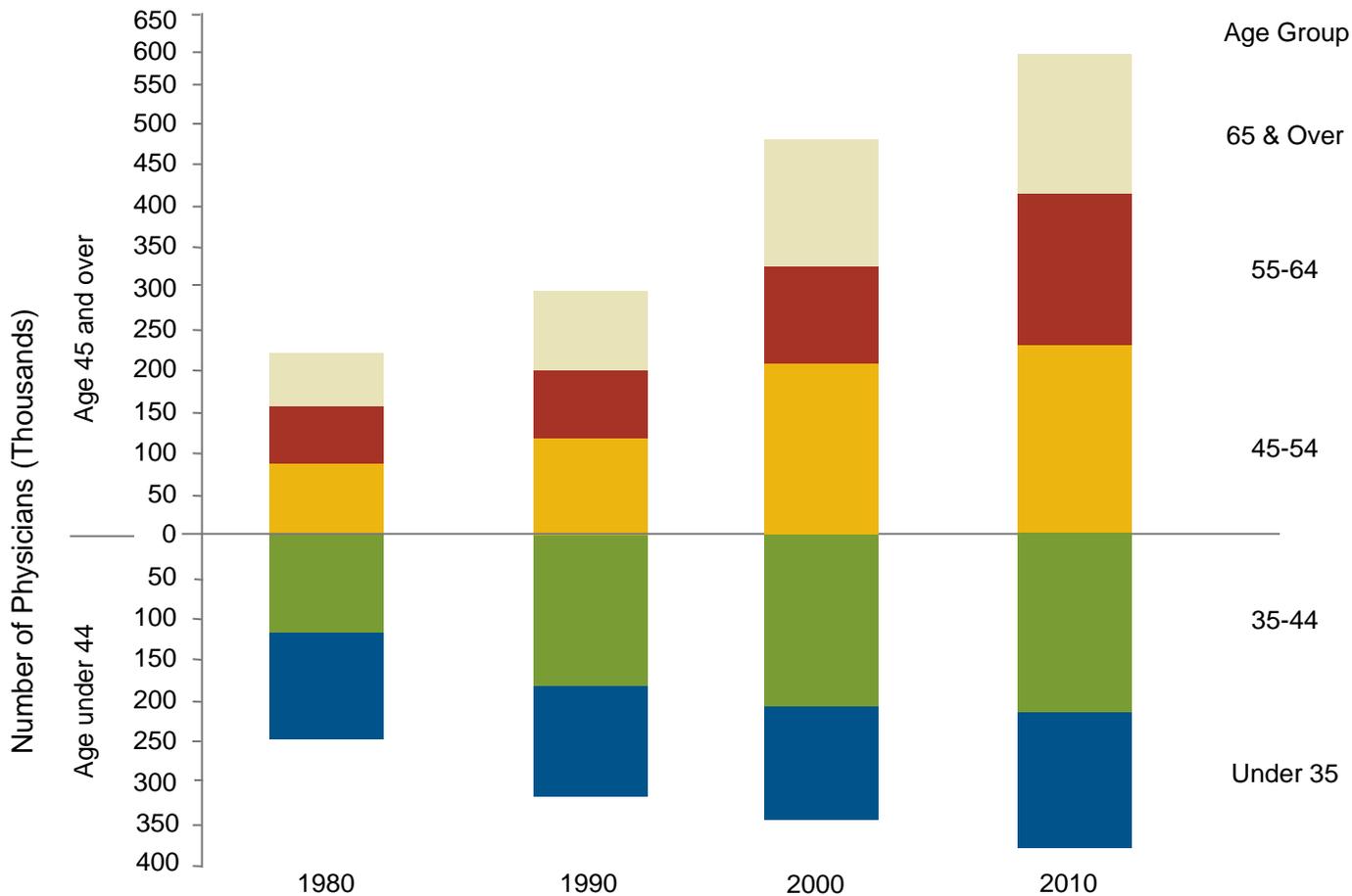
Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

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Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

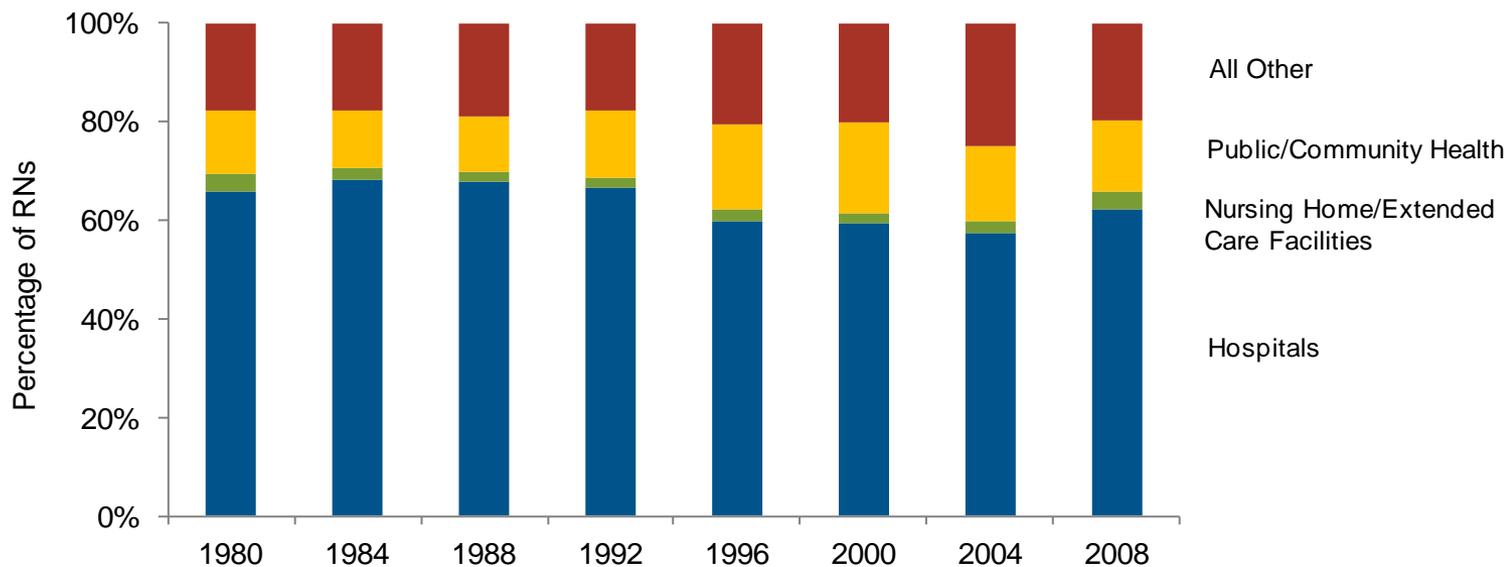
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Source: American Medical Association. (2012 Edition). *Physician Characteristics and Distribution in the U.S.*

<sup>(1)</sup> Includes inactive physicians and residents.

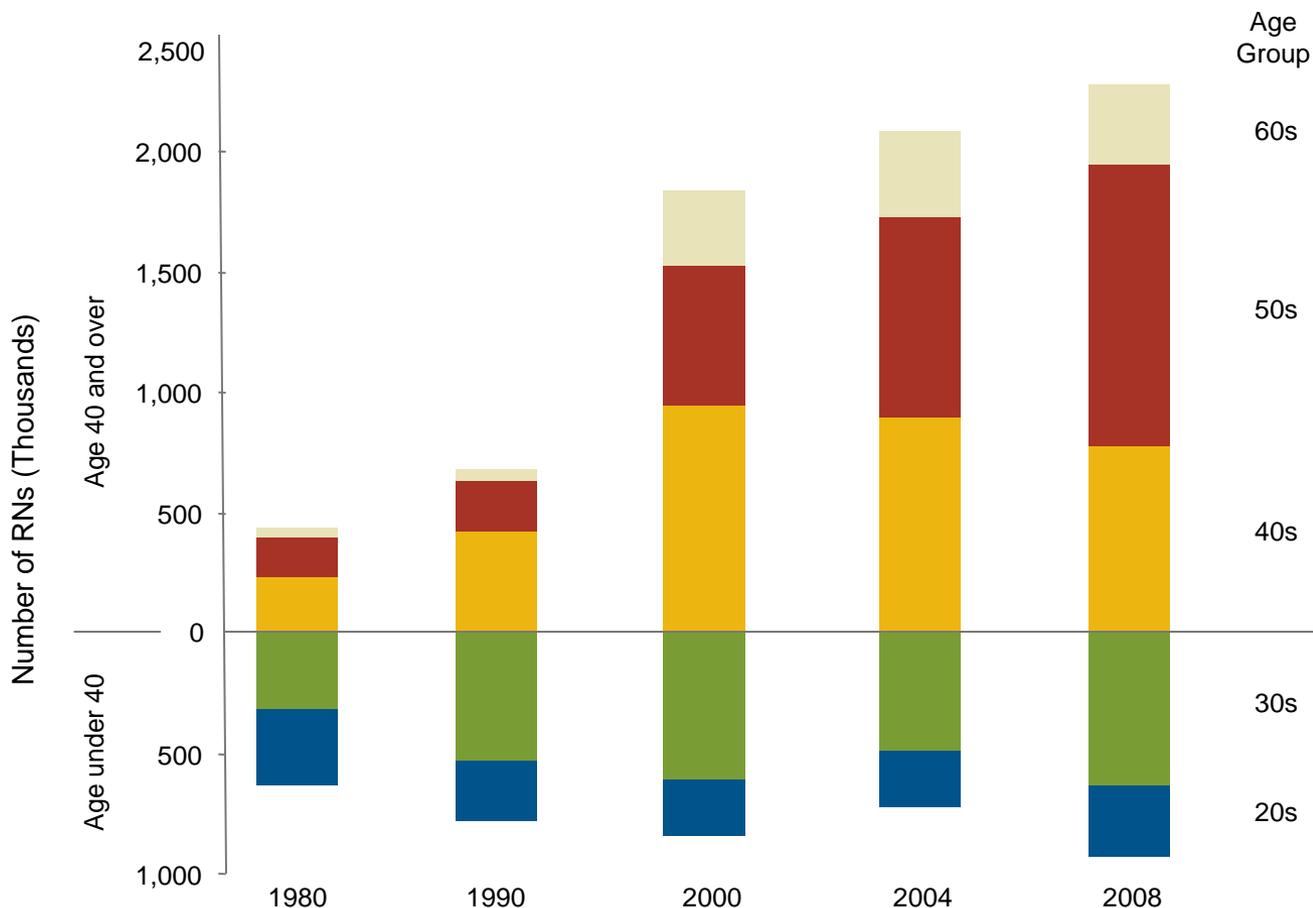
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Source: Bureau of Health Professions, Health Resources and Services Administration. (2010). *Findings from the 2008 National Sample Survey of Registered Nurses*. Link: <http://bhpr.hrsa.gov/healthworkforce/rnsurvey/2008/nssrn2008.pdf>.

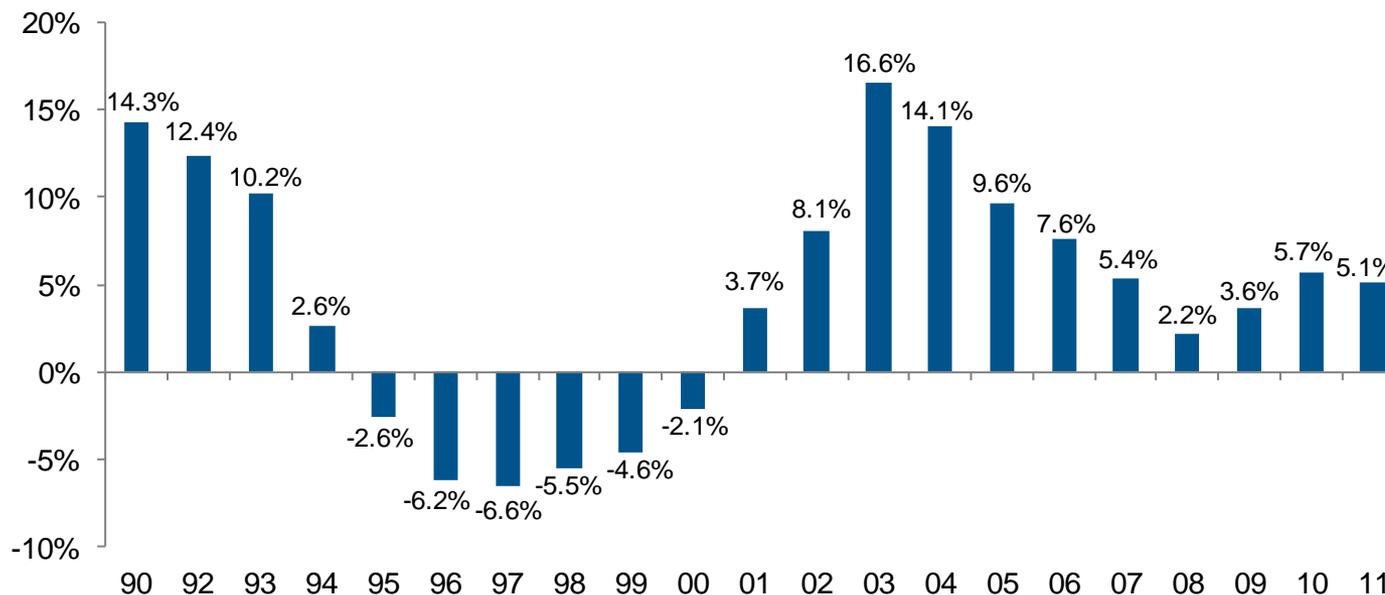
<sup>(1)</sup> Total percent by setting may not equal the estimated total of all registered nurses due to incomplete information provided by respondents and the effect of rounding.

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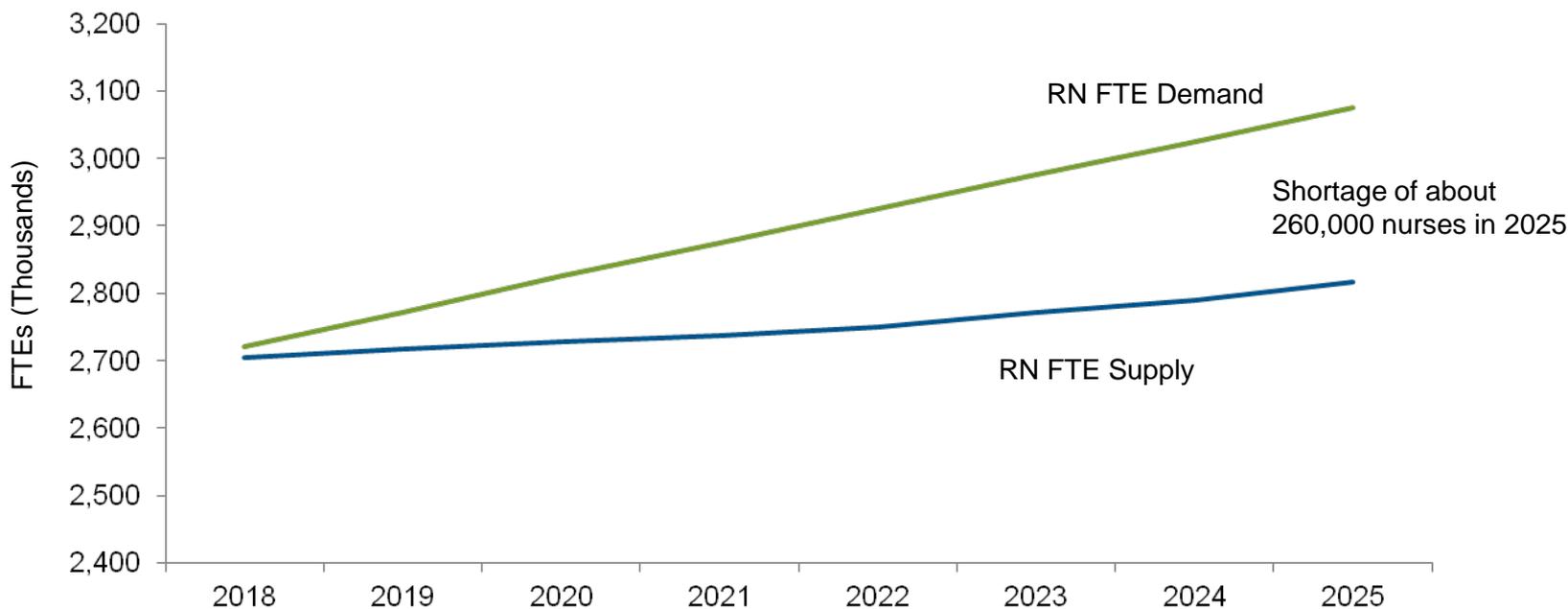
Source: Bureau of Health Professions, Health Resources and Services Administration. (1980-2004). *Findings from the National Survey of Registered Nurses*. Link: <http://bhpr.hrsa.gov/healthworkforce/rnsurvey04/2.htm#age>. Bureau of Health Professions, Health Resources and Services Administration. (2010). *Findings from the 2008 National Sample Survey of Registered Nurses*. Link: <http://bhpr.hrsa.gov/healthworkforce/rnsurvey/2008/nssrn2008.pdf>.

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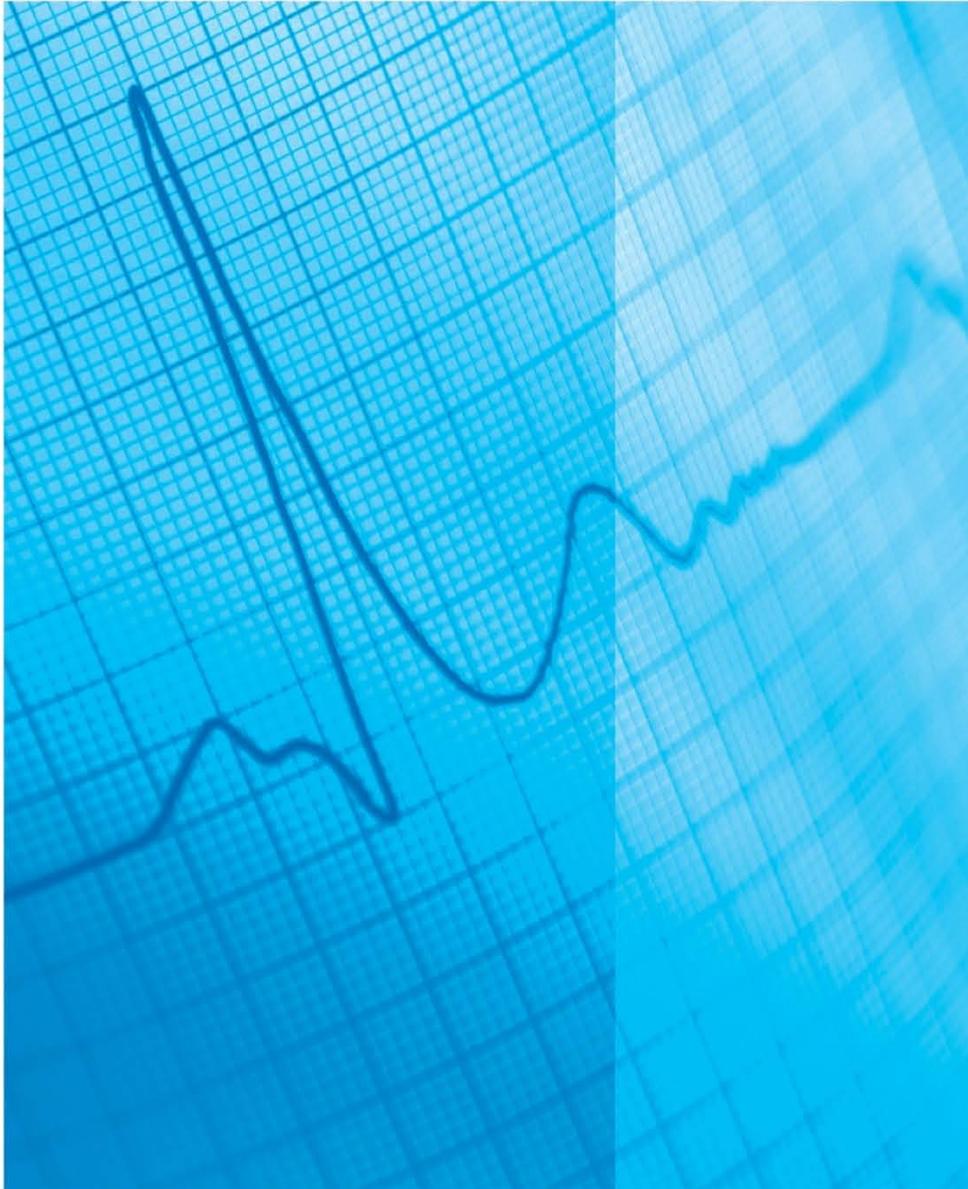


Source: American Association of Colleges of Nursing. (1994-2011). *Percent Change in Enrollments in Entry-Level Baccalaureate Nursing Programs: 1994-2011*. Link: <http://www.aacn.nche.edu/Media/pdf/EnrollChanges.pdf>, and Berlin, L.E. et al. *Enrollment and Graduations in Baccalaureate and Graduate Programs in Nursing*. Washington, DC: AACN.

### Chart 5.12: National Supply and Demand Projections for FTE RNs, 2018 – 2025



Source: Copyrighted and published by Project HOPE/Health Affairs as Buerhaus PI, Auerbach DI, Staiger DO. The Recent Surge In Nurse Employment: Causes and Implications. *Health Affairs*, 2009; 28(4):w657-68. The published article is archived and available online at [www.healthaffairs.org](http://www.healthaffairs.org).



## CHAPTER 6

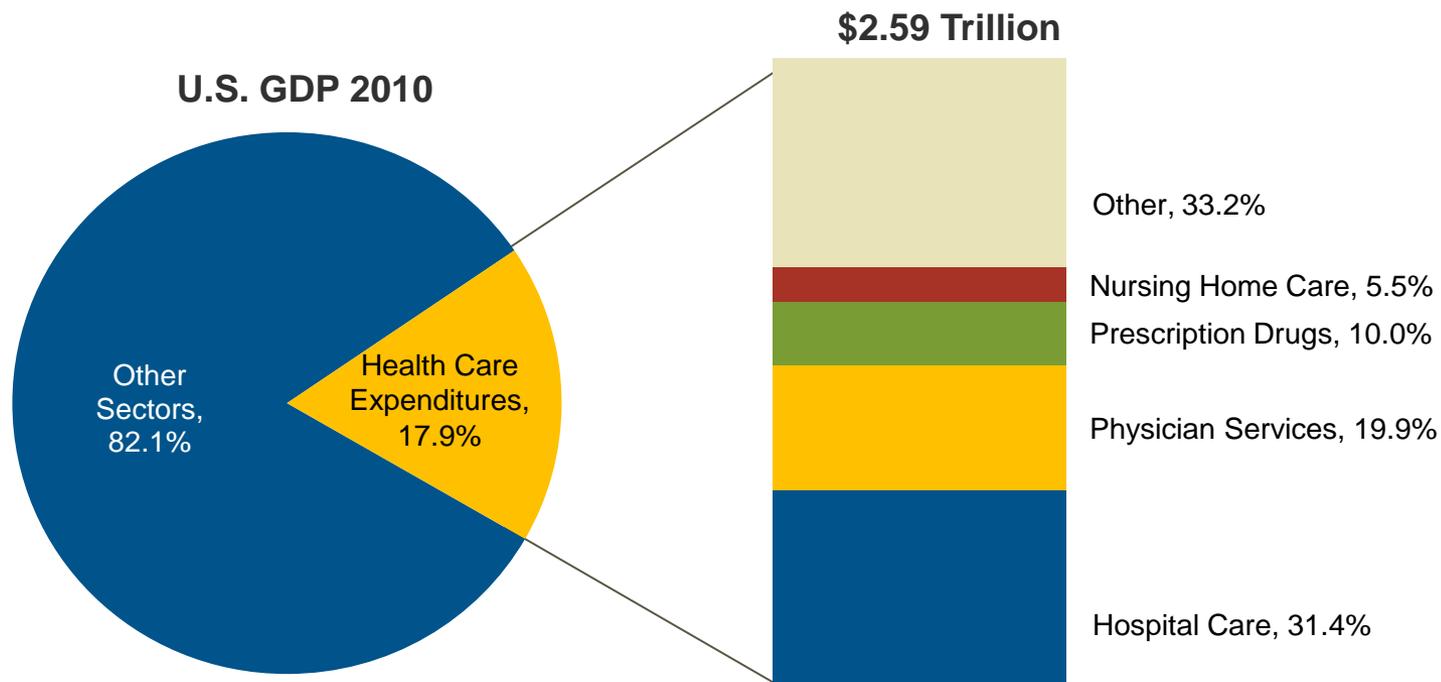
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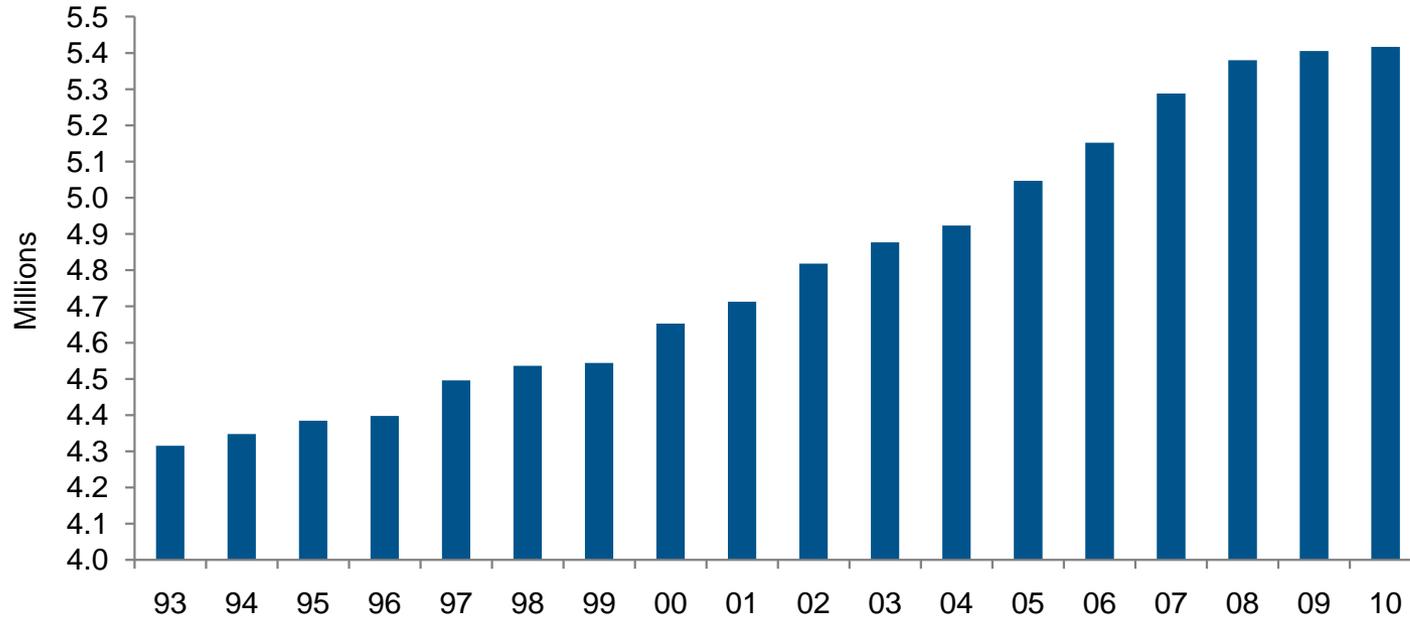
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### Chart 6.1: National Health Expenditures as a Percentage of Gross Domestic Product and Breakdown of National Health Expenditures, 2010



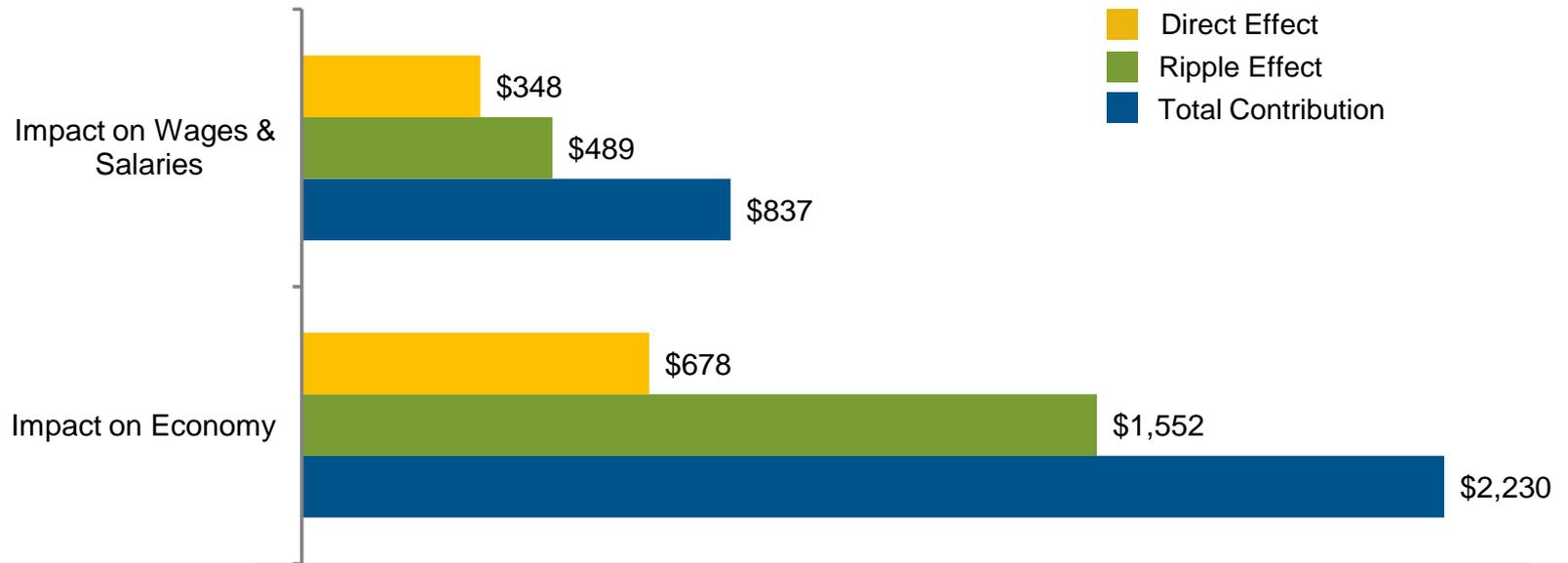
Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released January 9, 2012.

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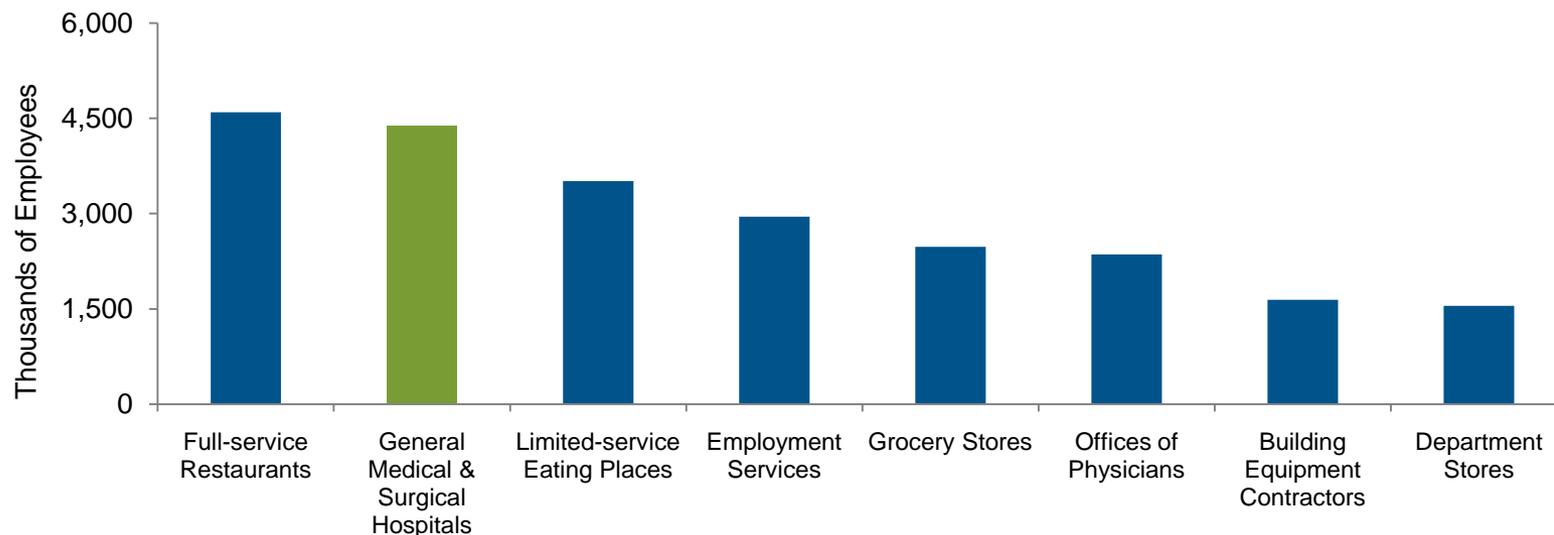
Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

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Source: Avalere Health, using BEA RIMS-II (1997/2006) multipliers, released in 2008, applied to 2010 American Hospital Association Annual Survey data. Note: Multipliers released in 2010 and subsequent years no longer include the national level multipliers needed for this chart.

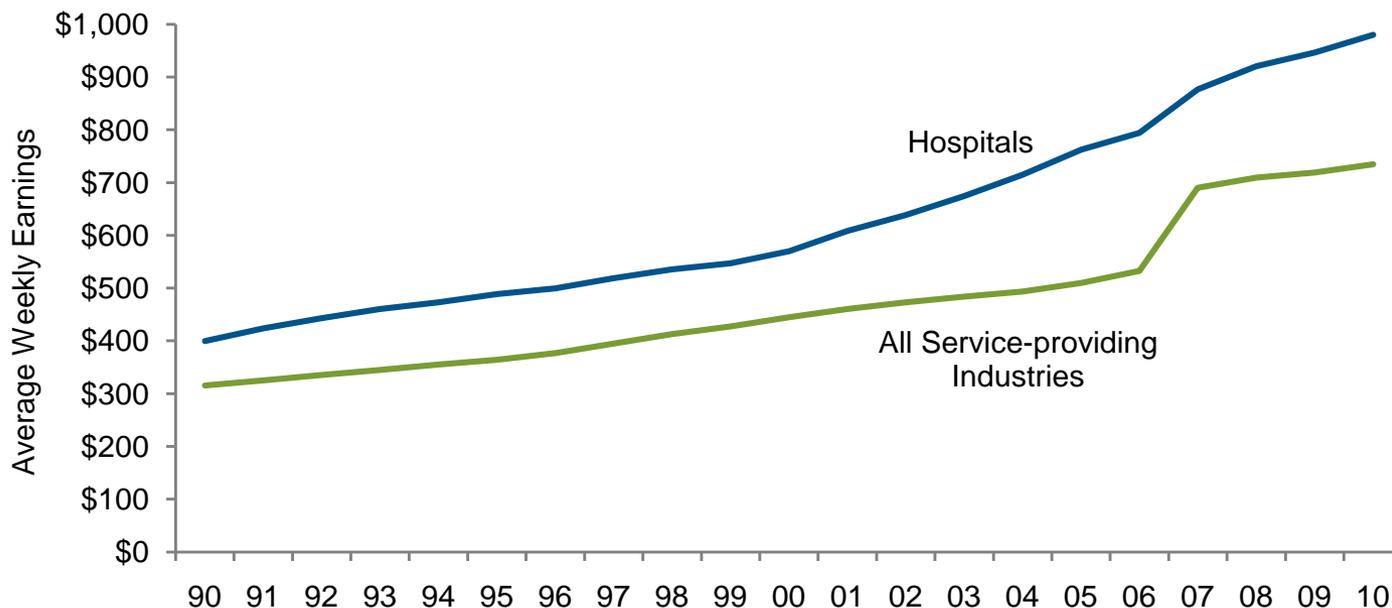
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Source: Department of Labor, Bureau of Labor Statistics, Current Employment Statistics (CES) Survey, customized tables. Data released 2012.  
Link: <http://www.bls.gov/ces>.

<sup>(1)</sup> 2011 figures reflect annual projections.

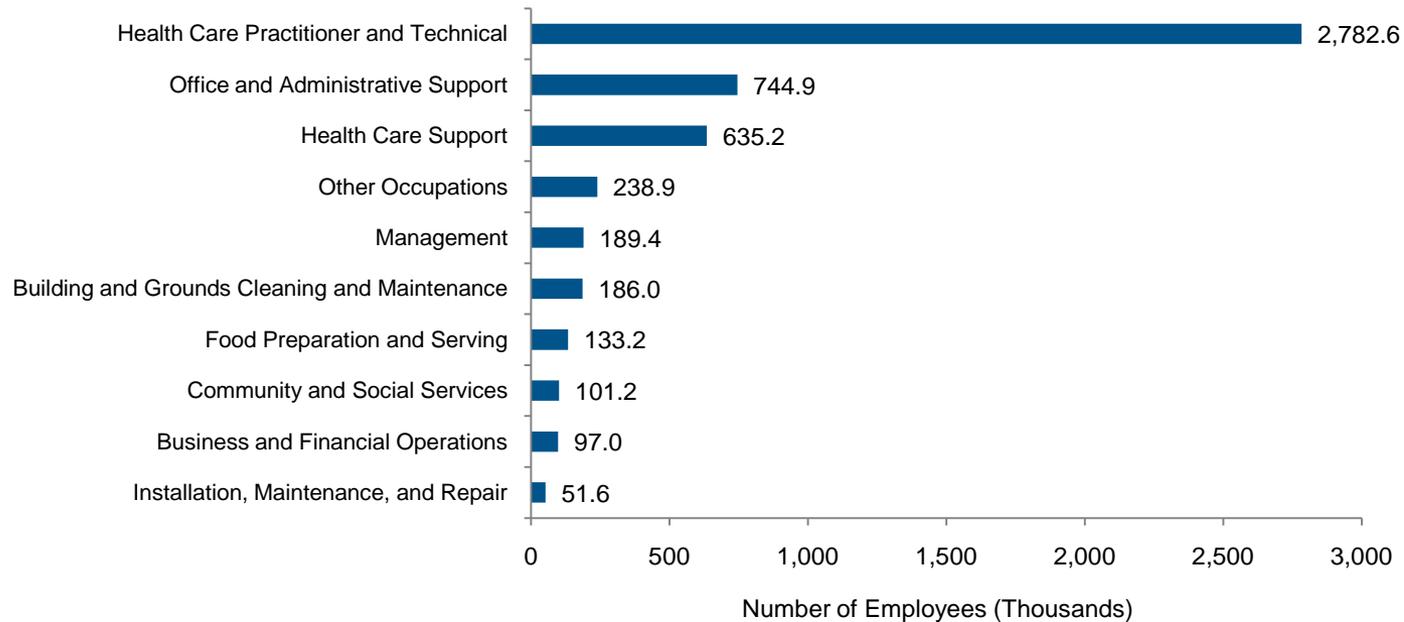
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Source: Department of Labor, Bureau of Labor Statistics, Current Employment Statistics (CES) Survey, customized tables. Data released 2012.  
Link: <http://www.bls.gov/ces>.

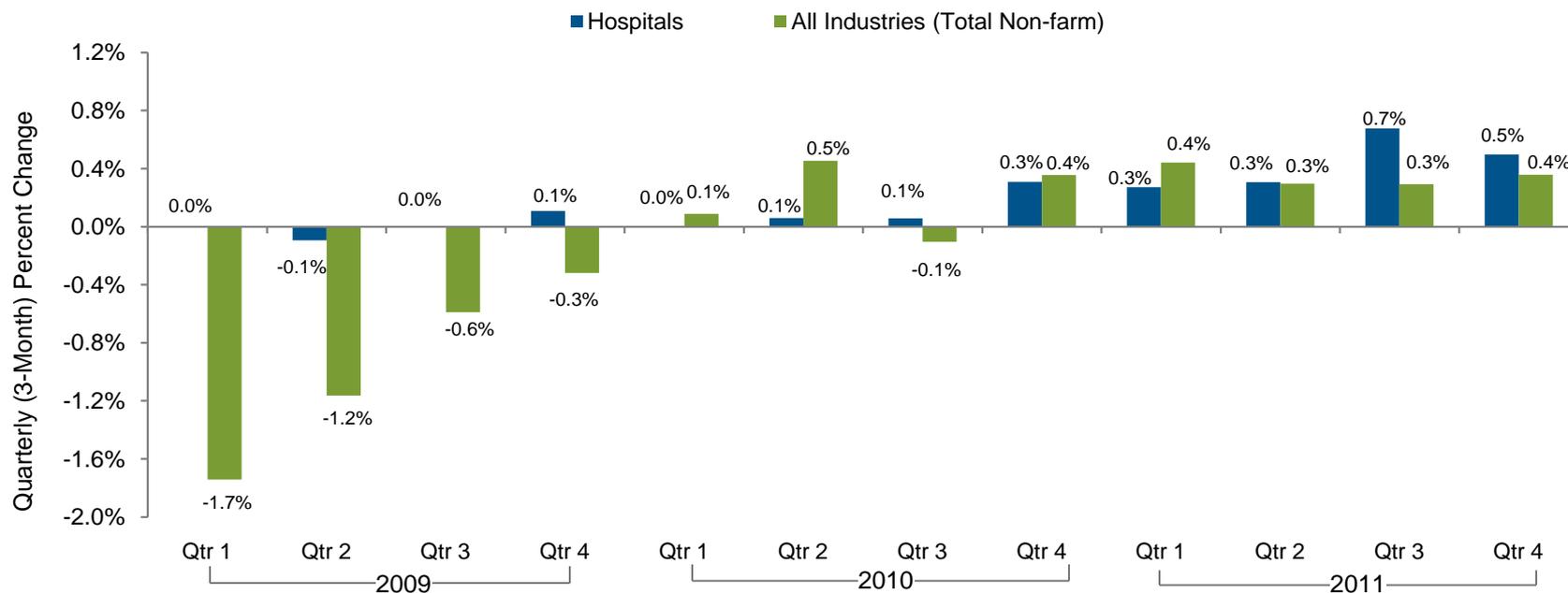
<sup>(1)</sup> Includes physicians employed by hospitals.

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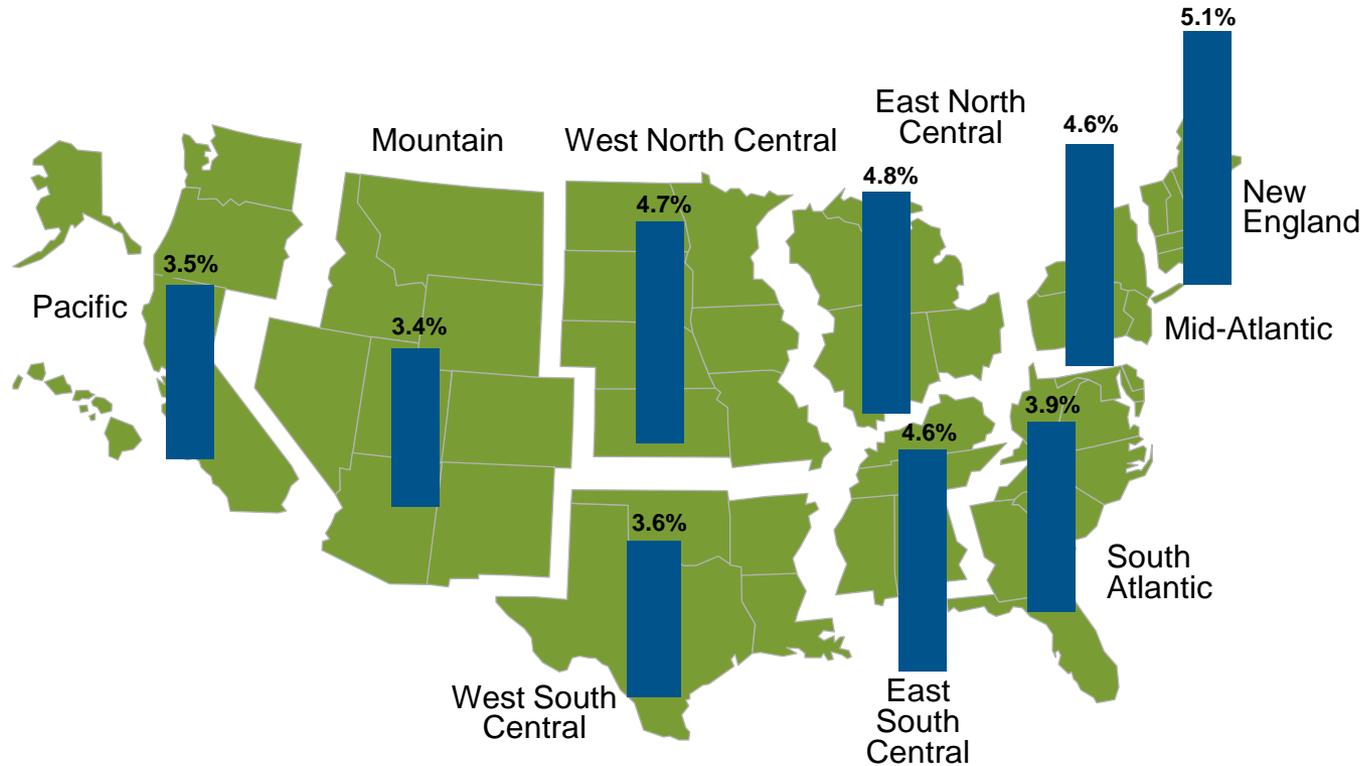
Source: Department of Labor, Bureau of Labor Statistics, 2010 National Industry-specific Occupational Employment and Wage. Data released February 2012. Link: [http://www.bls.gov/oes/current/naics4\\_622100.htm](http://www.bls.gov/oes/current/naics4_622100.htm)

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Source: Department of Labor, Bureau of Labor Statistics. Data released February 2012. Link: <http://www.bls.gov/bls/employment.htm>.

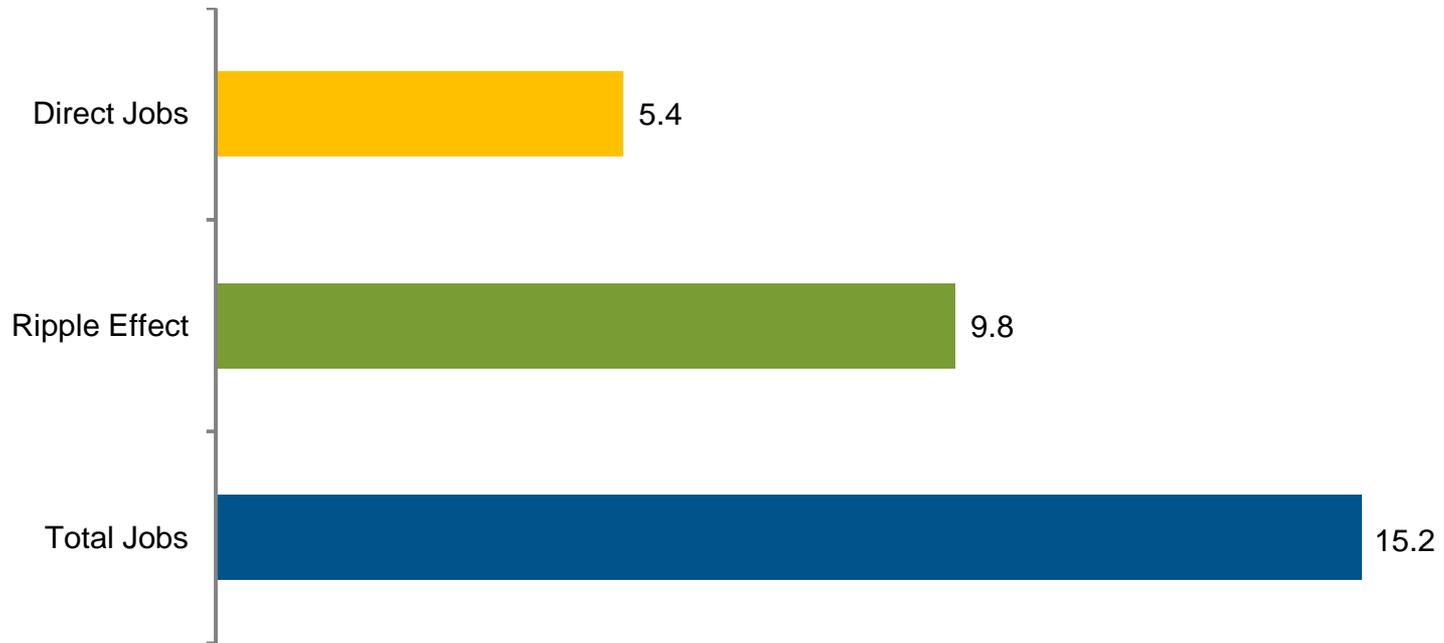
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Source: Avalere Health analysis of American Hospital Association 2010 Annual Survey data and 2010 total non-farm employment data from the Bureau of Labor Statistics.

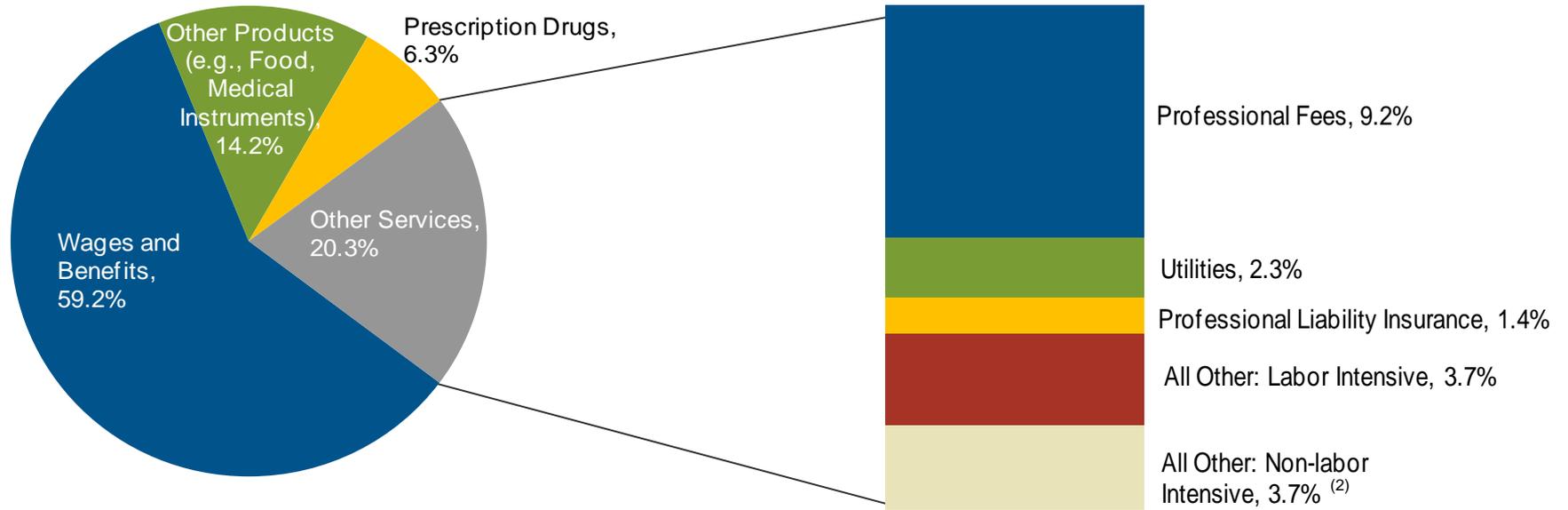
<sup>(1)</sup> Does not include farm employment.

### Chart 6.9: Impact of Community Hospitals on U.S. Jobs (in millions), 2010



Source: Avalere Health, using BEA RIMS-II (1997/2006) multipliers, released in 2008, applied to 2010 American Hospital Association Annual Survey data. Note: Multipliers released in 2010 and subsequent years no longer include the national level multipliers needed for this chart.

### Chart 6.10: Percent of Hospital Costs<sup>(1)</sup> by Type of Expense, 2Q11



Source: AHA analysis of Centers for Medicare and Medicaid Services data, using base year 2006 weights.

(1) Does not include capital.

(2) Includes postage and telephone expenses.

Chart 6.11: Hospital Impact on Sectors of the U.S. Economy  
(in \$ billions), 2010

Industry	Economic Impact
Health care and social assistance	\$784.5
Manufacturing	334.1
Real estate and rental and leasing	211.2
Finance and insurance	142.5
Professional, scientific and technical services	92.7
Retail trade	91.1
Wholesale trade	73.0
Information	72.9
Transportation and warehousing	69.4
Administrative and waste management services	69.1
Accommodation and food services	57.3
Other services	56.0
Management of companies and enterprises	44.8
Utilities	39.7
Agriculture, forestry, fishing and hunting	32.7
Educational services	18.0
Arts, entertainment, and recreation	16.0
Mining	14.1
Construction	11.1
<b>Total</b>	<b>\$2,230.2</b>

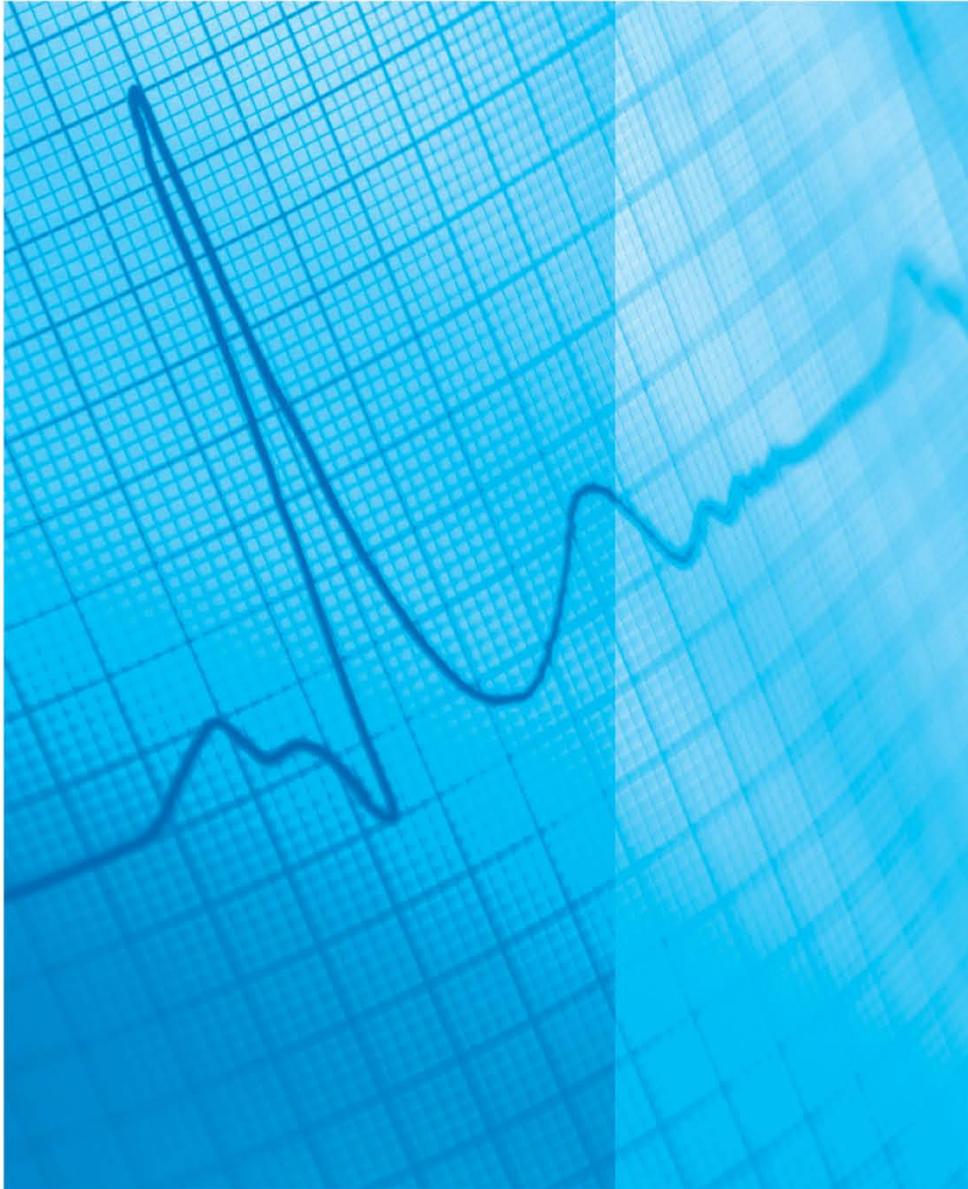
Source: Avalere Health, using BEA RIMS-II (1997/2006) multipliers, released in 2008, applied to 2010 American Hospital Association Annual Survey data. Note: Multipliers released in 2010 and subsequent years no longer include the national level multipliers needed for this chart.

# Chart 6.12: Impact of Community Hospitals on U.S. Economy; All States, DC and Total U.S., 2010

State Name	Number of Hospital Jobs (FT and PT)	Multiplier for Employment	Effect of Hospital Jobs on Total Jobs in State Economy	Percent of Total (Non-farm) Employment Supported by Hospital Employment	Hospital Payroll and Benefits (\$ millions)	Multiplier for Earnings	Effect of Hospital Payroll and Benefits on Total Labor Income (\$ millions)	Hospital Expenditures (\$ millions)	Multiplier for Output	Effect of Hospital Expenditures on Total Output in State Economy (\$ millions)
Alabama	81,050	1.9758	160,139	8.57%	\$4,109	1.6621	\$6,829	\$8,334	1.9923	\$16,605
Alaska	12,192	1.7814	21,719	6.70%	\$872	1.4677	\$1,280	\$1,590	1.7088	\$2,717
Arizona	85,613	2.2149	189,624	7.98%	\$5,615	1.7314	\$9,721	\$11,272	2.0687	\$23,318
Arkansas	50,474	1.8300	92,367	7.94%	\$2,513	1.5637	\$3,930	\$5,246	1.8487	\$9,699
California	488,456	2.3042	1,125,500	8.10%	\$38,621	1.8965	\$73,245	\$72,280	2.3420	\$169,279
Colorado	70,340	2.2496	158,237	7.13%	\$4,791	1.8891	\$9,051	\$9,591	2.3169	\$22,221
Connecticut	65,196	2.0244	131,983	8.21%	\$4,885	1.7086	\$8,346	\$8,928	2.0617	\$18,407
Delaware	19,731	2.1103	41,638	10.09%	\$1,321	1.6031	\$2,117	\$2,344	1.9111	\$4,480
District of Columbia	27,913	1.5922	44,443	6.25%	\$1,971	1.3291	\$2,620	\$3,582	1.3437	\$4,814
Florida	279,929	2.1443	600,252	8.37%	\$17,911	1.7878	\$32,022	\$36,318	2.1511	\$78,124
Georgia	141,150	2.2096	311,885	8.15%	\$8,119	1.8840	\$15,296	\$16,080	2.3070	\$37,096
Hawaii	17,838	2.1596	38,523	6.56%	\$1,393	1.6612	\$2,315	\$2,611	1.9817	\$5,174
Idaho	25,185	1.7692	44,557	7.39%	\$1,384	1.4977	\$2,072	\$2,547	1.7388	\$4,428
Illinois	237,967	2.1686	516,055	9.20%	\$14,696	1.9107	\$28,080	\$29,194	2.3663	\$69,081
Indiana	127,285	2.0287	258,223	9.25%	\$7,506	1.7202	\$12,912	\$15,350	2.0906	\$32,091
Iowa	66,981	1.6647	111,503	7.59%	\$3,581	1.4545	\$5,209	\$6,935	1.7000	\$11,789
Kansas	53,064	1.7464	92,671	7.00%	\$3,027	1.5257	\$4,618	\$5,759	1.8124	\$10,438
Kentucky	81,802	2.0280	165,894	9.37%	\$4,615	1.6979	\$7,836	\$9,802	2.0379	\$19,975
Louisiana	86,905	1.9313	167,840	8.91%	\$4,770	1.6381	\$7,814	\$9,593	1.9072	\$18,296
Maine	35,372	2.1742	76,906	12.98%	\$2,125	1.6875	\$3,585	\$4,239	2.0071	\$8,508
Maryland	94,615	2.0864	197,405	7.85%	\$6,018	1.7282	\$10,401	\$12,132	2.0812	\$25,250
Massachusetts	179,918	2.1357	384,251	12.06%	\$11,452	1.8160	\$20,796	\$22,819	2.2082	\$50,389
Michigan	209,486	2.0748	434,642	11.26%	\$12,668	1.7804	\$22,554	\$24,873	2.1424	\$53,288
Minnesota	119,049	2.1561	256,682	9.73%	\$7,309	1.7948	\$13,118	\$13,508	2.1924	\$29,614
Mississippi	58,168	1.8351	106,744	9.80%	\$3,036	1.5370	\$4,667	\$5,636	1.8097	\$10,199
Missouri	136,484	2.1313	290,888	10.99%	\$7,849	1.7859	\$14,017	\$16,522	2.1623	\$35,725
Montana	21,954	1.8161	39,871	9.31%	\$1,260	1.4847	\$1,870	\$2,379	1.7194	\$4,091
Nebraska	43,526	1.6845	73,320	7.80%	\$2,314	1.4916	\$3,451	\$4,711	1.7363	\$8,180
Nevada	24,727	2.1203	52,429	4.70%	\$1,951	1.6122	\$3,145	\$3,940	1.9068	\$7,513
New Hampshire	32,217	2.0348	65,555	10.53%	\$2,167	1.7251	\$3,739	\$3,782	2.0025	\$7,573
New Jersey	141,403	2.2187	313,731	8.14%	\$9,744	1.8620	\$18,144	\$17,954	2.3043	\$41,371
New Mexico	26,052	2.0270	52,807	6.59%	\$1,943	1.5556	\$3,022	\$3,541	1.7998	\$6,373
New York	413,832	1.8859	780,446	9.12%	\$32,206	1.6499	\$53,137	\$56,081	2.0272	\$113,687
North Carolina	166,222	2.1035	349,648	9.05%	\$9,767	1.7307	\$16,904	\$18,848	2.0936	\$39,460
North Dakota	22,149	1.5349	33,997	9.05%	\$1,161	1.3917	\$1,603	\$2,143	1.5739	\$3,373
Ohio	275,724	2.2110	609,626	12.12%	\$16,653	1.8354	\$30,566	\$32,374	2.2319	\$72,256
Oklahoma	56,685	1.9909	112,854	7.39%	\$3,091	1.6495	\$5,099	\$6,485	1.9567	\$12,688
Oregon	54,922	2.2605	124,151	7.76%	\$4,110	1.7341	\$7,128	\$7,876	2.0741	\$16,335
Pennsylvania	279,661	2.1776	608,990	10.84%	\$16,584	1.8813	\$31,199	\$33,930	2.3041	\$78,177
Rhode Island	20,687	2.0352	42,102	9.18%	\$1,671	1.7029	\$2,845	\$2,884	2.0299	\$5,854
South Carolina	72,910	2.1454	156,421	8.67%	\$4,306	1.7331	\$7,463	\$9,350	2.1226	\$19,846
South Dakota	20,799	1.5567	32,378	8.04%	\$1,201	1.3813	\$1,659	\$2,194	1.5912	\$3,492
Tennessee	113,684	2.1469	244,068	9.34%	\$6,194	1.8124	\$11,226	\$12,699	2.2204	\$28,197
Texas	339,860	2.2410	761,626	7.36%	\$21,848	1.8786	\$41,043	\$44,226	2.3321	\$103,139
Utah	39,529	2.3212	91,755	7.77%	\$2,198	1.8421	\$4,049	\$4,471	2.2688	\$10,143
Vermont	13,707	1.9945	27,339	9.19%	\$981	1.5422	\$1,513	\$1,715	1.7754	\$3,045
Virginia	112,401	2.0191	226,949	6.26%	\$7,062	1.7358	\$12,258	\$14,710	2.1314	\$31,352
Washington	107,348	2.2898	245,805	8.85%	\$7,909	1.7538	\$13,872	\$14,642	2.1359	\$31,274
West Virginia	43,492	1.8533	80,604	10.80%	\$2,320	1.5288	\$3,548	\$4,689	1.7493	\$8,203
Wisconsin	111,726	2.0515	229,206	8.38%	\$6,732	1.7331	\$11,667	\$14,231	2.0768	\$29,554
Wyoming	9,343	1.6113	15,054	5.33%	\$600	1.3621	\$817	\$1,031	1.5494	\$1,598
<b>United States*</b>	<b>5,416,723</b>	<b>2.8048</b>	<b>15,192,825</b>	<b>11.71%</b>	<b>\$348,131</b>	<b>2.4031</b>	<b>\$836,594</b>	<b>\$677,968</b>	<b>3.2896</b>	<b>\$2,230,244</b>

Source: Avalere Health, using BEA RIMS-II (2002/2008) multipliers for hospital NAICS Code 622, released 2011, applied to American Hospital Association Annual Survey data for 2010. Hospital jobs are total part time and full time jobs. Hospital labor income is defined as payroll plus benefits. The percent of total employment supported by direct and indirect hospital employment is based on 2010 BLS data. Expenditures are defined as total expenditures minus bad debt. In previous years, expenditures were defined as net patient revenue plus other operating revenue. \*Multipliers released in 2010 and subsequent years no longer include the national level multipliers needed for the U.S. summary row. BEA RIMS-II (1997/2006) multipliers released in 2008 and applied to 2009 AHA annual survey data were used instead.





# CHAPTER 7

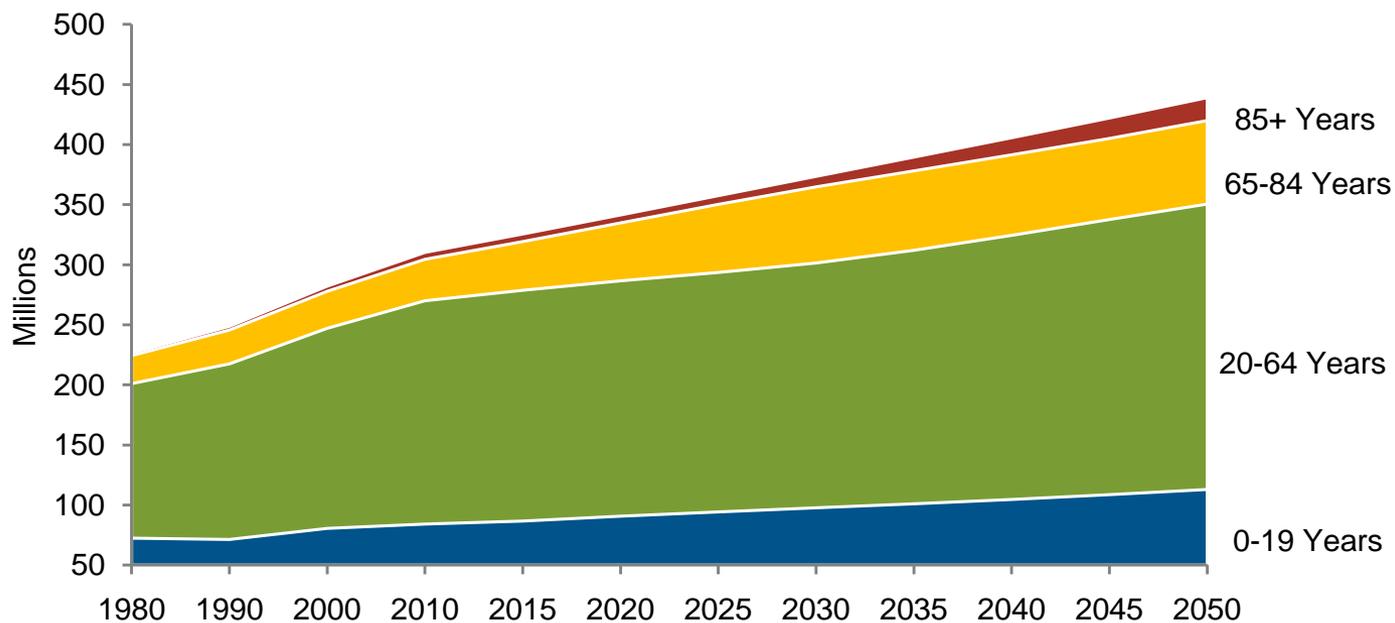
Community Health  
Indicators

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- Chart 7.3: Age-adjusted Death Rates, Selected Causes, by Race, 2008
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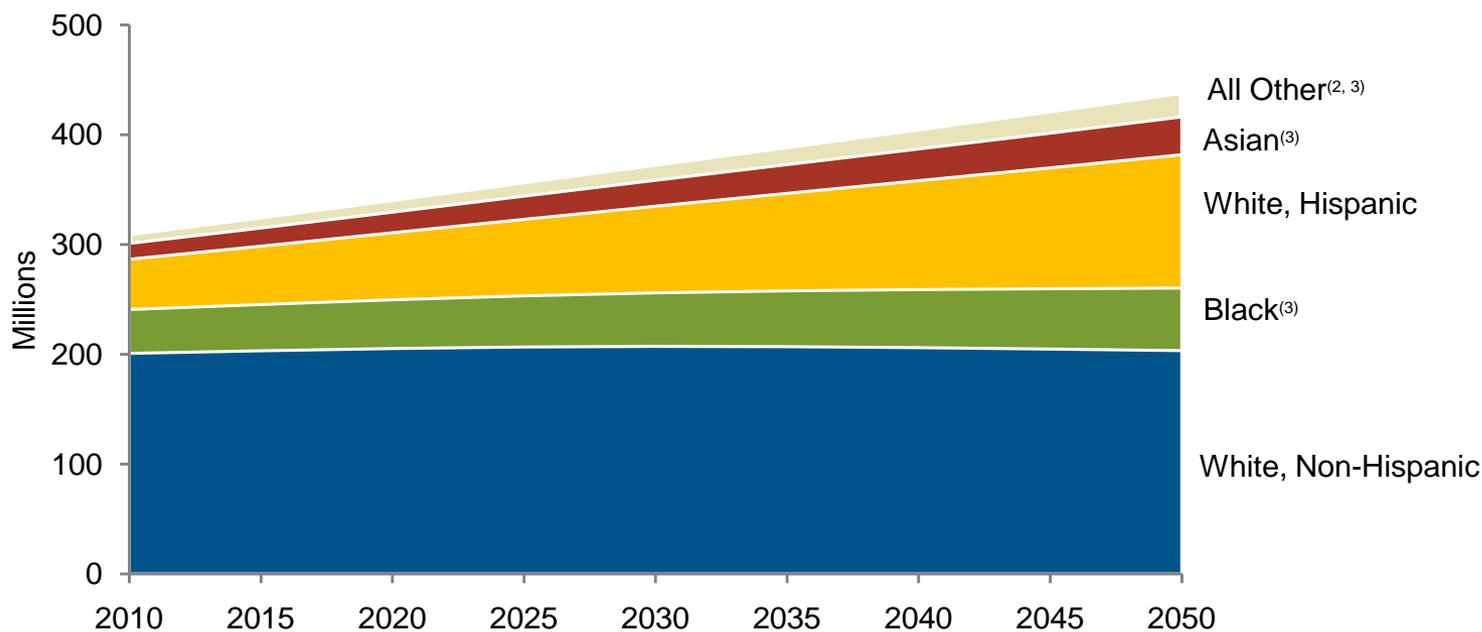
Chart 7.1: U.S. Population Trends and Projections by Age, 1980 – 2050<sup>(1)</sup>



Source: U.S. Department of Commerce, Bureau of the Census. *Projections of the Population by Age and Sex for the United States: 2010-2050.*

<sup>(1)</sup> Years 2010 through 2050 are projections.

### Chart 7.2: U.S. Population Trends and Projections by Race, 2010 – 2050<sup>(1)</sup>



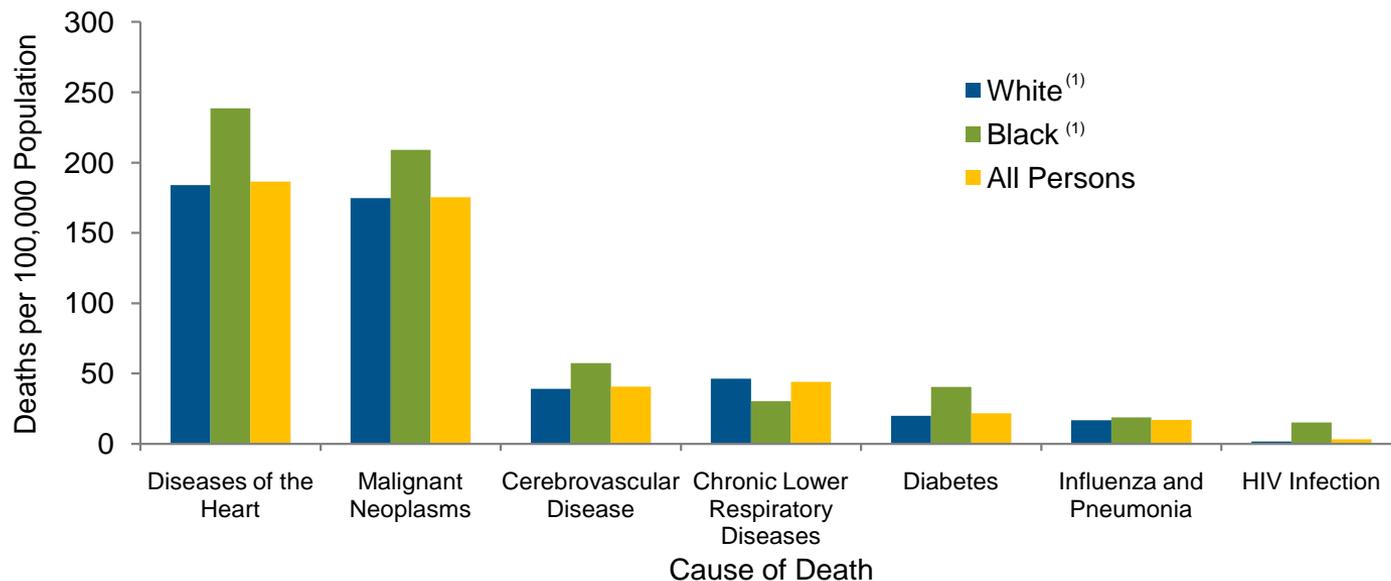
Source: U.S. Department of Commerce, Bureau of the Census. *Projections of the Population by Sex, Race, and Hispanic Origin for the United States: 2010-2050.*

(1) Years 2010 through 2050 are projections.

(2) All other includes American Indian, Native Alaskan, Native Hawaiian, other Pacific Islander, and two or more races.

(3) Black, Asian, and all other categories include Hispanic and non-Hispanic individuals.

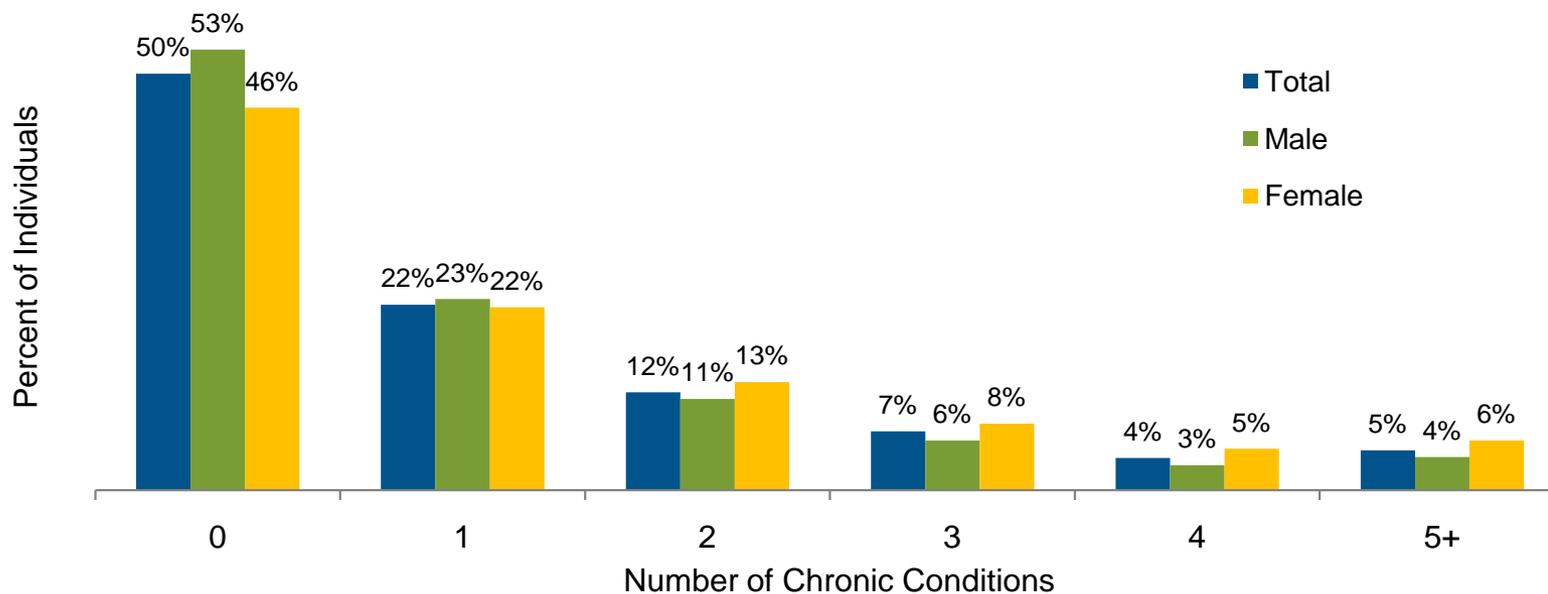
### Chart 7.3: Age-adjusted Death Rates, Selected Causes, by Race, 2008



Source: National Center for Health Statistics. (2012). *Health, United States, 2011*. Hyattsville, MD.

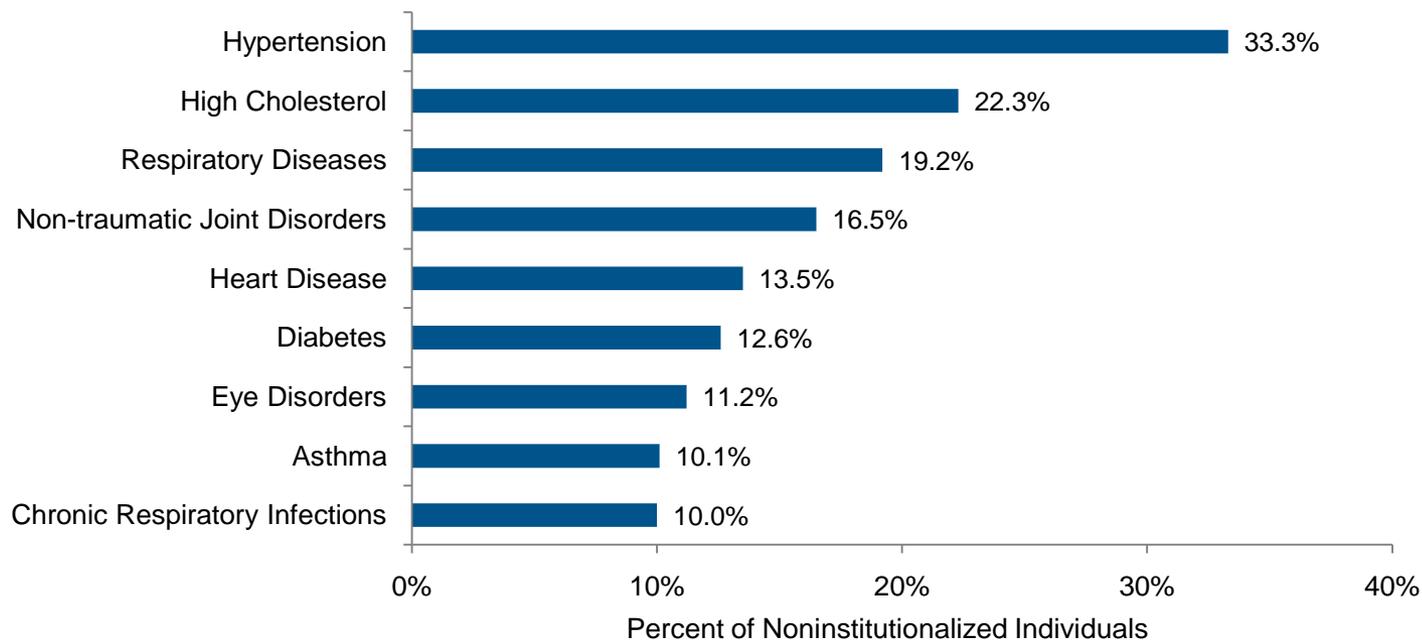
<sup>(1)</sup> Racial categories include individuals of both Hispanic and non-Hispanic origin.

### Chart 7.4: Percent of People with Chronic Conditions by Number and Sex, 2006



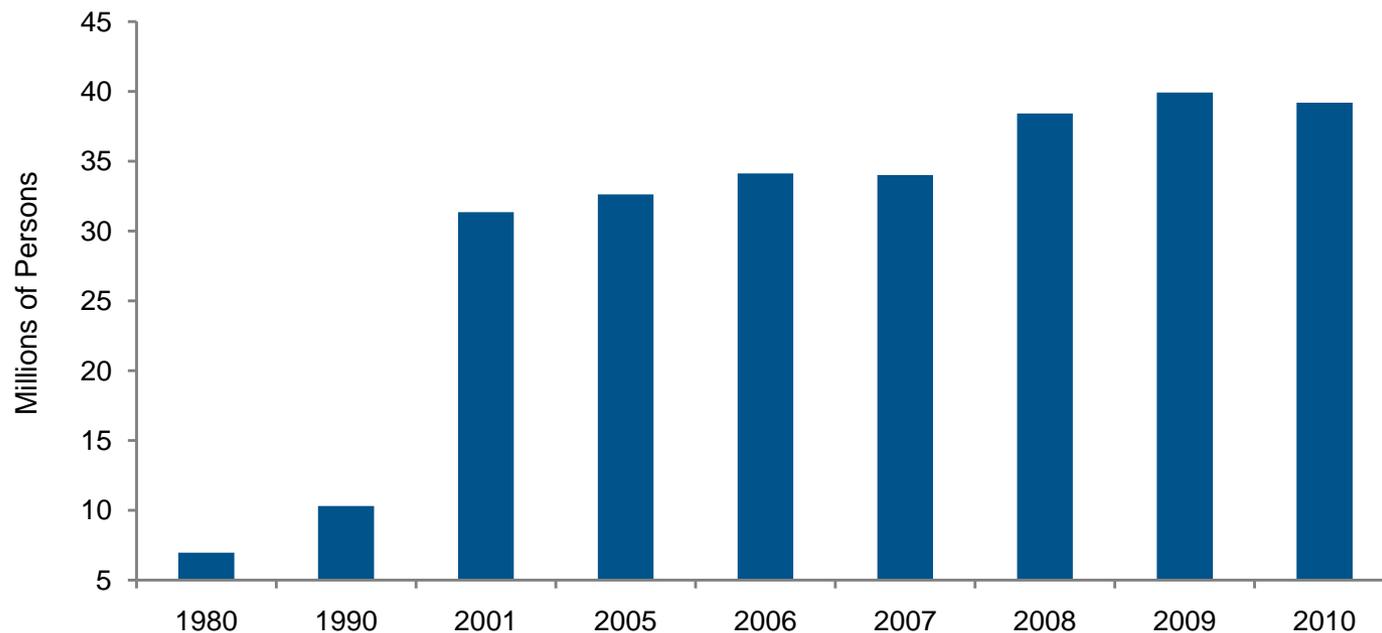
Source: Anderson, G. (2010). *Chronic Care: Making the Case for Ongoing Care*. Johns Hopkins University and the Robert Wood Johnson Foundation.

### Chart 7.5: Percent of People with Chronic Conditions by Type, 2006



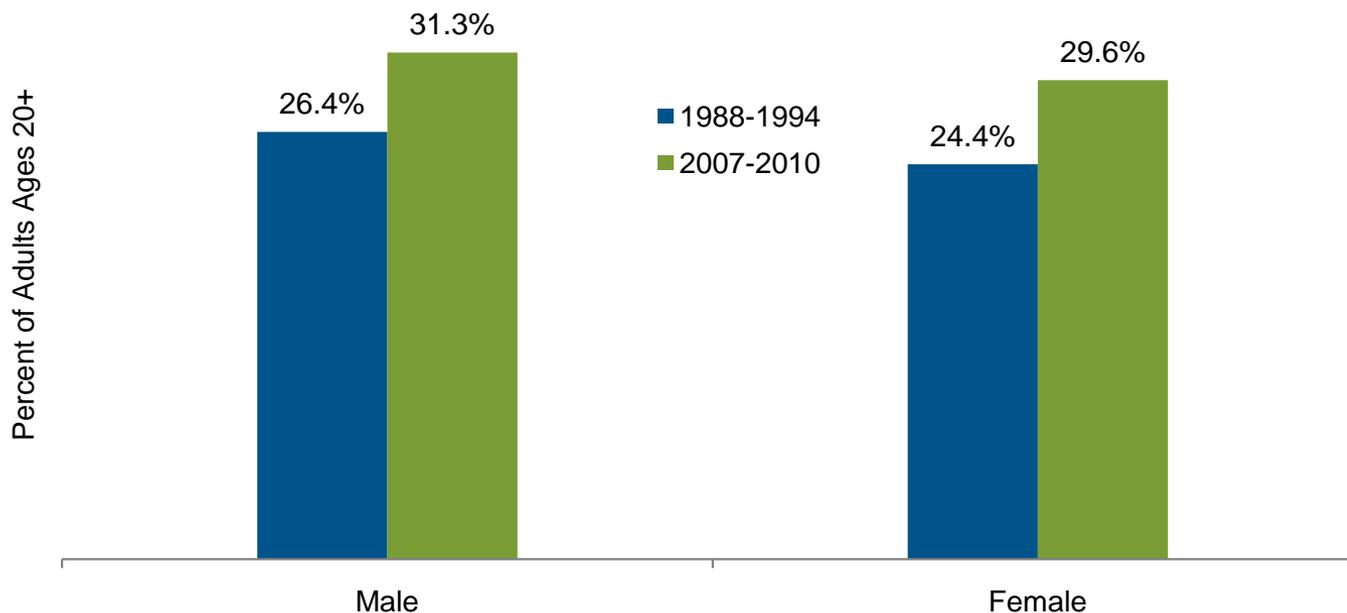
Source: Anderson, G. (2010). *Chronic Care: Making the Case for Ongoing Care*. Johns Hopkins University and the Robert Wood Johnson Foundation.

### Chart 7.6: Number of Persons with Asthma, 1980 – 2010



Source: Centers for Disease Control and Prevention (2002). "Asthma Surveillance – United States, 1980-1999." National Center for Health Statistics. National Health Interview Survey 2001, 2005, 2006, 2007, 2008, 2009, and 2010.

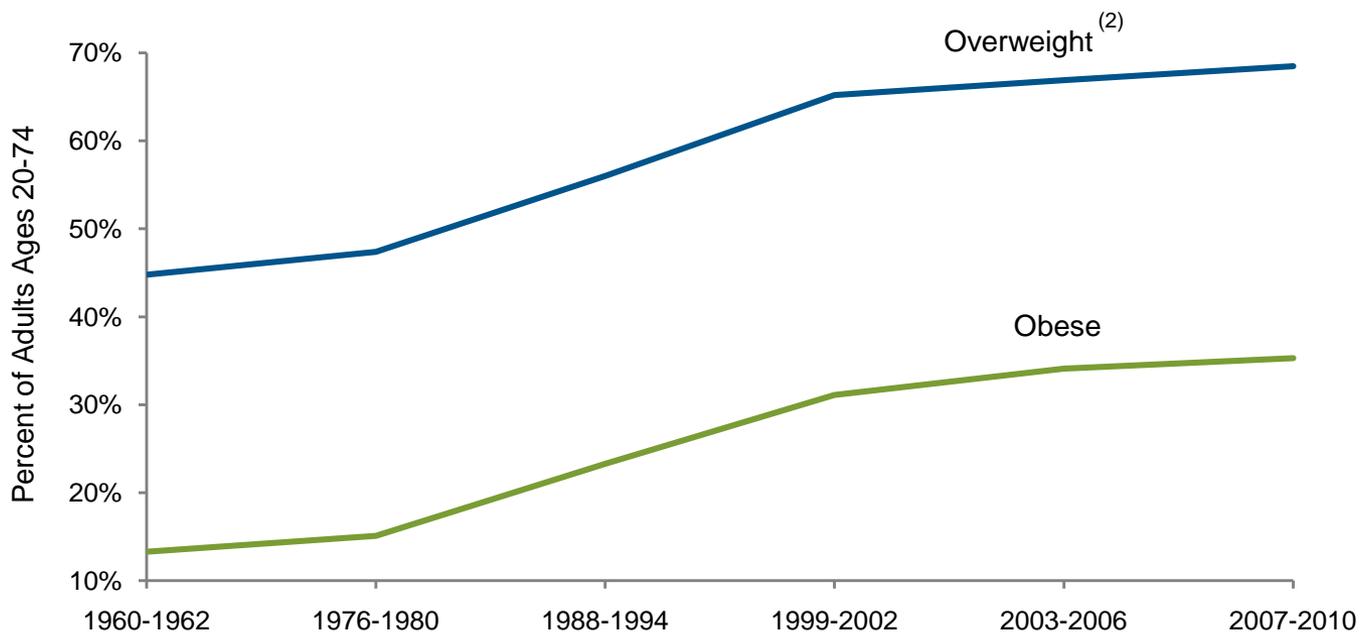
Chart 7.7: Percent of Adults with Hypertension by Sex,<sup>(1)</sup> 1988 – 1994 and 2007 – 2010



Source: National Center for Health Statistics. (2012). *Health, United States, 2011*. Hyattsville, MD.

(1) Data are age-adjusted to 2000 standard population.

### Chart 7.8: Percent of Adults Who Are Overweight and Obese,<sup>(1)</sup> 1960 – 2010

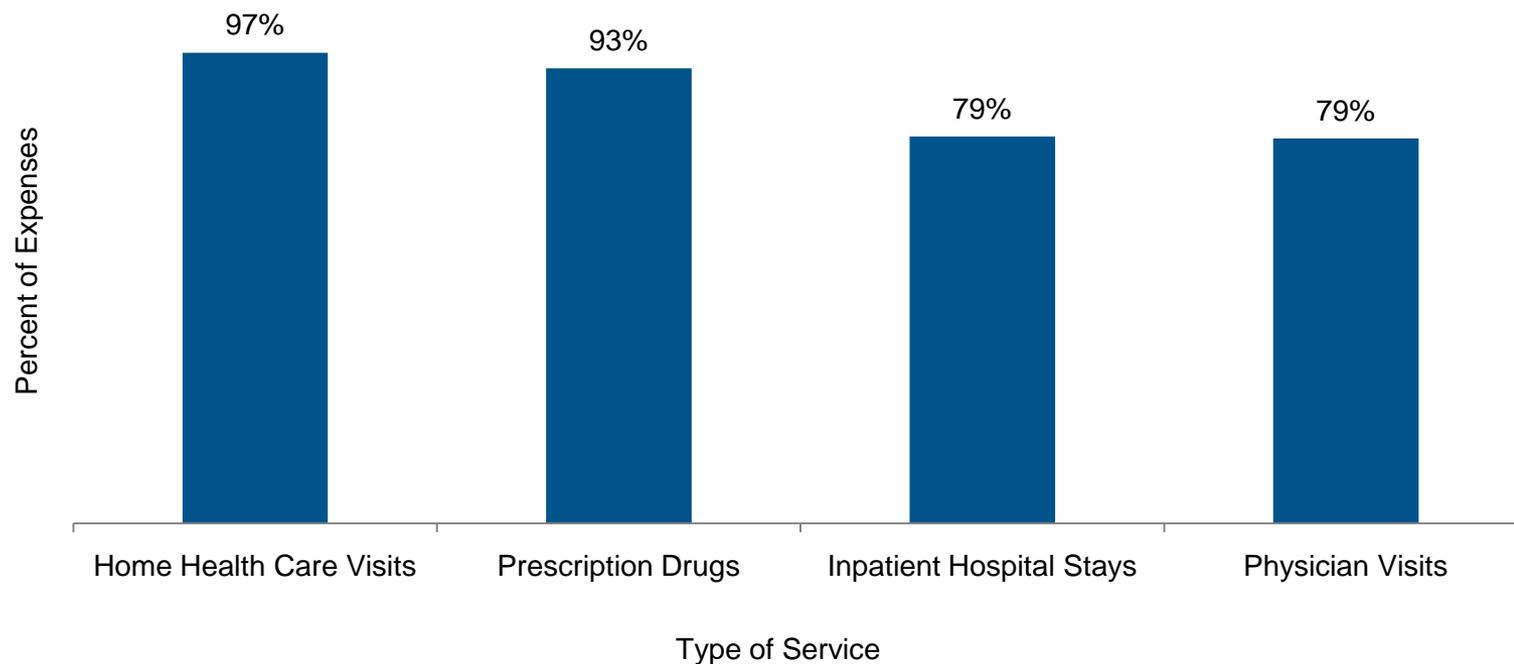


Source: National Center for Health Statistics. (2012). *Health, United States, 2011*. Hyattsville, MD.

(1) Data are age-adjusted to 2000 standard population.

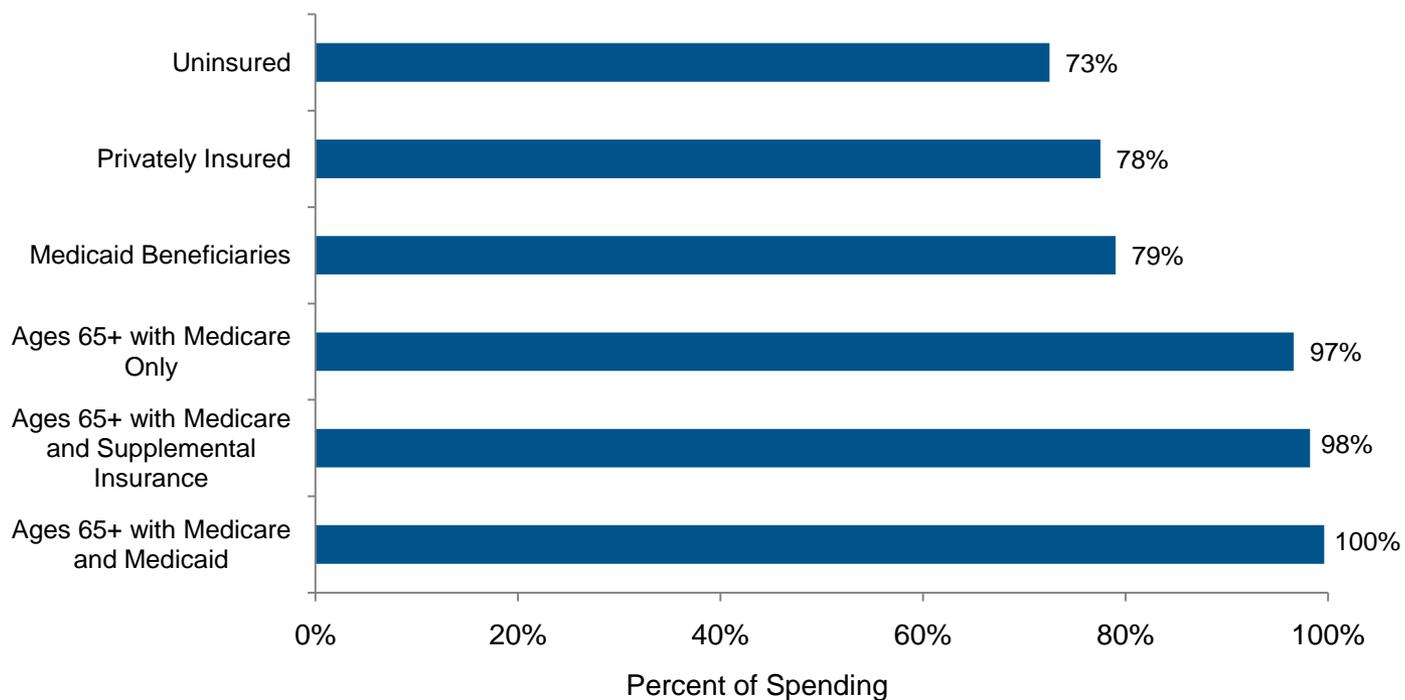
(2) Overweight includes obese.

### Chart 7.9: Percent of Services Used by People with Chronic Conditions, 2006



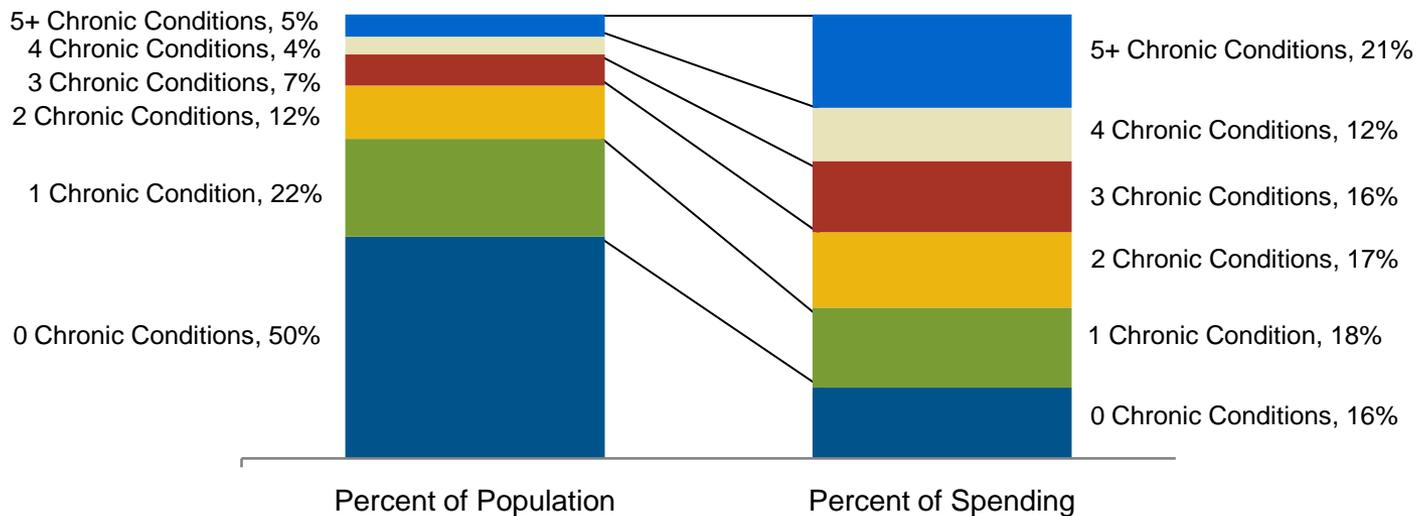
Source: Anderson, G. (2010). *Chronic Care: Making the Case for Ongoing Care*. Johns Hopkins University and the Robert Wood Johnson Foundation.

### Chart 7.10: Percent of Spending for Individuals with Chronic Conditions by Insurance Status, 2006



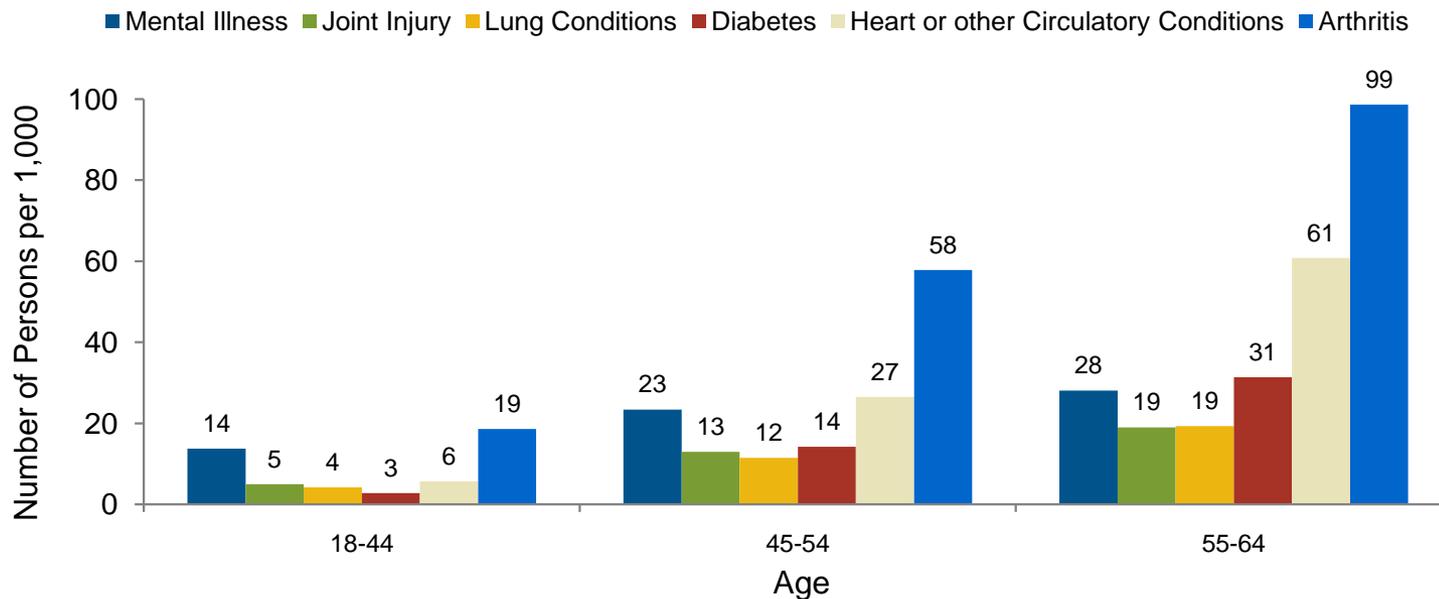
Source: Anderson, G. (2010). *Chronic Care: Making the Case for Ongoing Care*. Johns Hopkins University and the Robert Wood Johnson Foundation.

### Chart 7.11: Percent of Population vs. Percent of Spending, by Number of Chronic Conditions, 2006



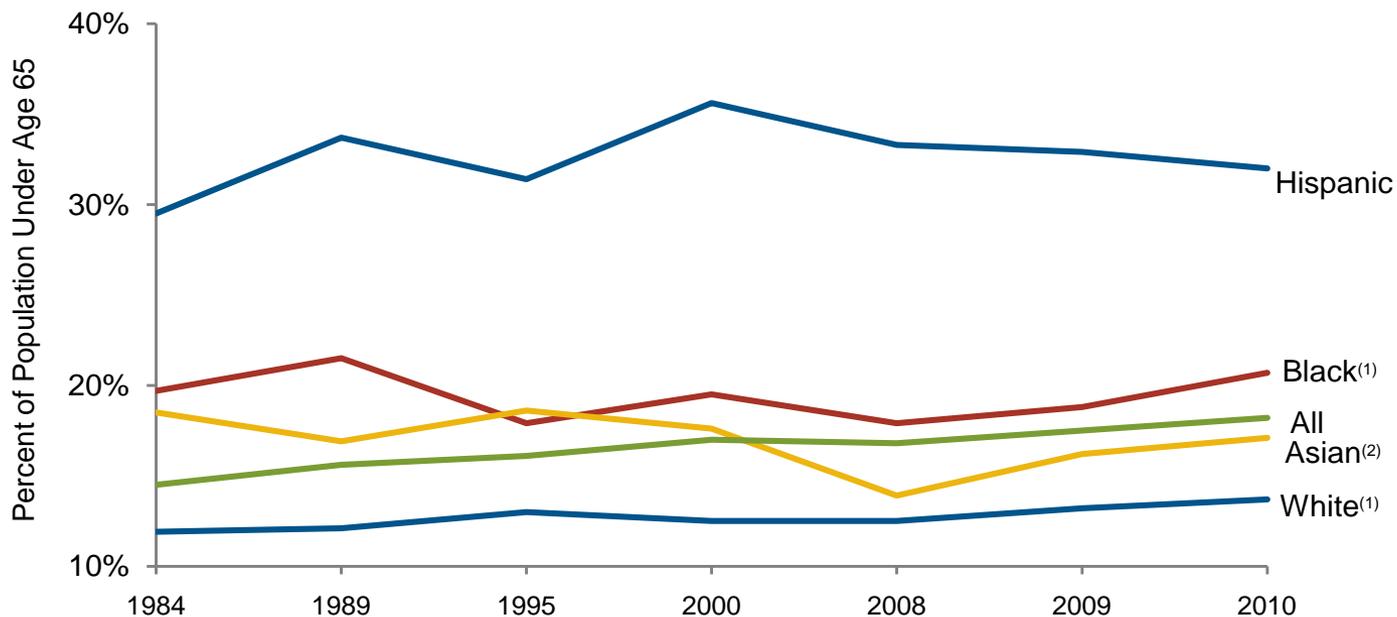
Source: Anderson, G. (2010). *Chronic Care: Making the Case for Ongoing Care*. Johns Hopkins University and the Robert Wood Johnson Foundation.

### Chart 7.12: Working Age Adults with Activity Limitations Due to Chronic Conditions, by Condition and Age, 2006 – 2007



Source: National Center for Health Statistics. (2010). *Health, United States, 2009*. Hyattsville, MD.

### Chart 7.13: Percent Uninsured by Race, 1984 – 2010

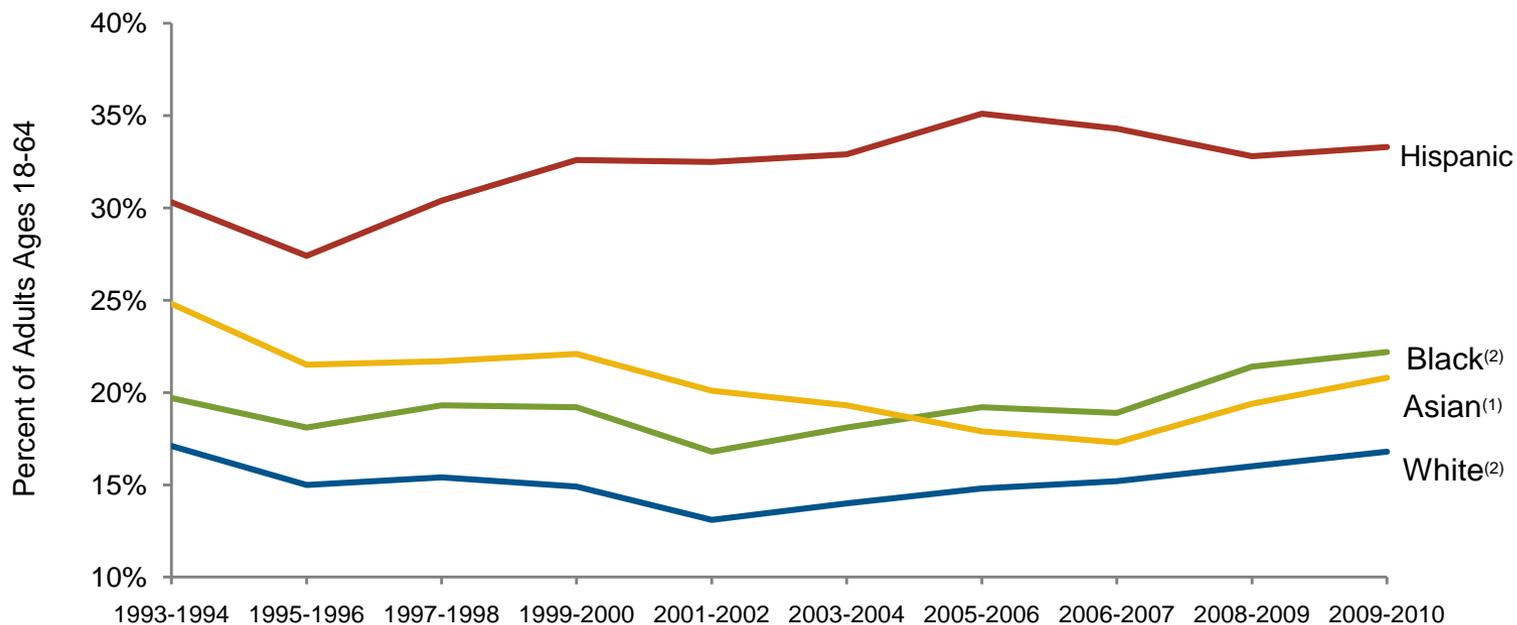


Source: National Center for Health Statistics. (2012). *Health, United States, 2011*. Hyattsville, MD.

(1) Includes individuals of non-Hispanic origin only.

(2) Includes individuals of Hispanic and non-Hispanic origin.

### Chart 7.14: Percent of Adults with No Usual Source of Care by Race, 1993 – 2010

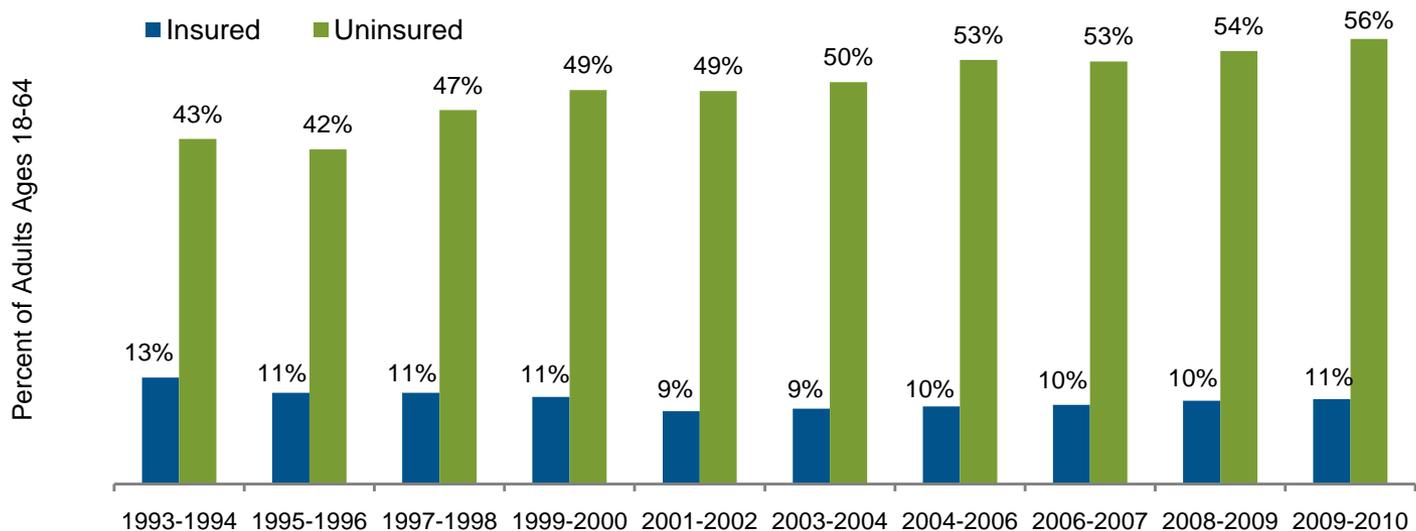


Source: National Center for Health Statistics. (2012). *Health, United States, 2011*. Hyattsville, MD.

<sup>(1)</sup> Includes individuals of Hispanic and non-Hispanic origin.

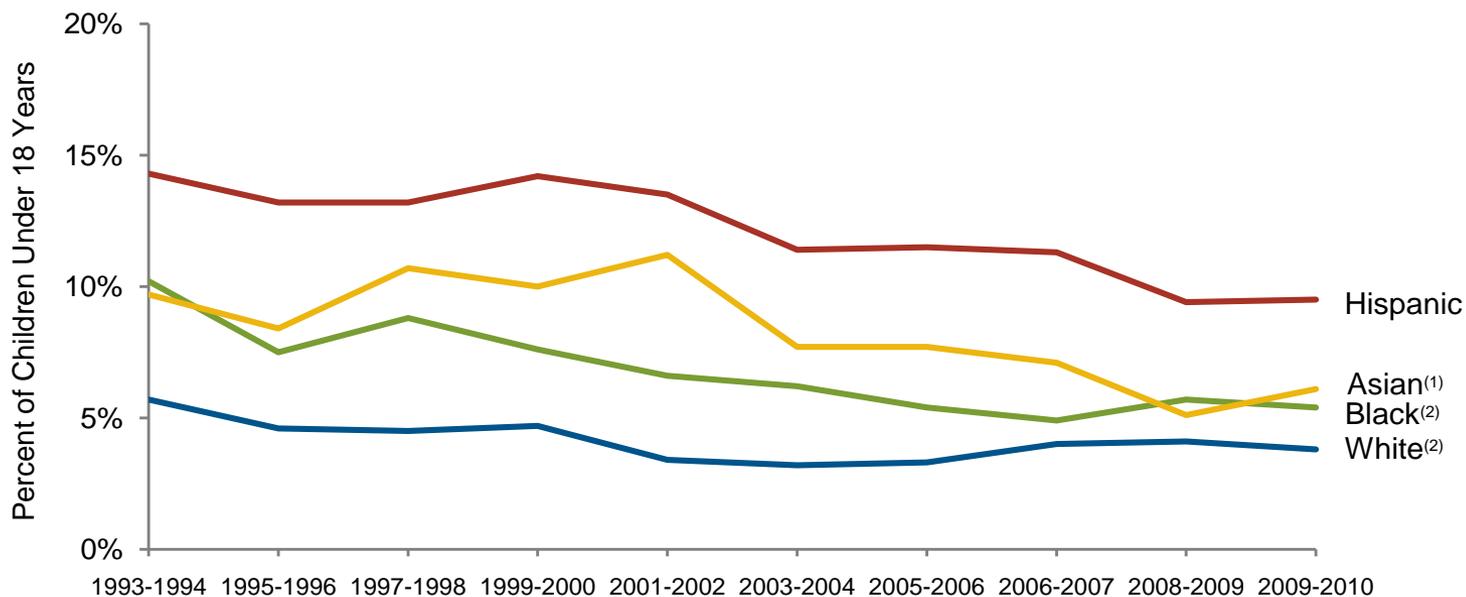
<sup>(2)</sup> Includes individuals of non-Hispanic origin only.

### Chart 7.15: Percent of Adults with No Usual Source of Care by Insurance Status, 1993 – 2010



Source: National Center for Health Statistics. (2012). *Health, United States, 2011*. Hyattsville, MD.

### Chart 7.16: Percent of Children with No Usual Source of Care by Race, 1993 – 2010

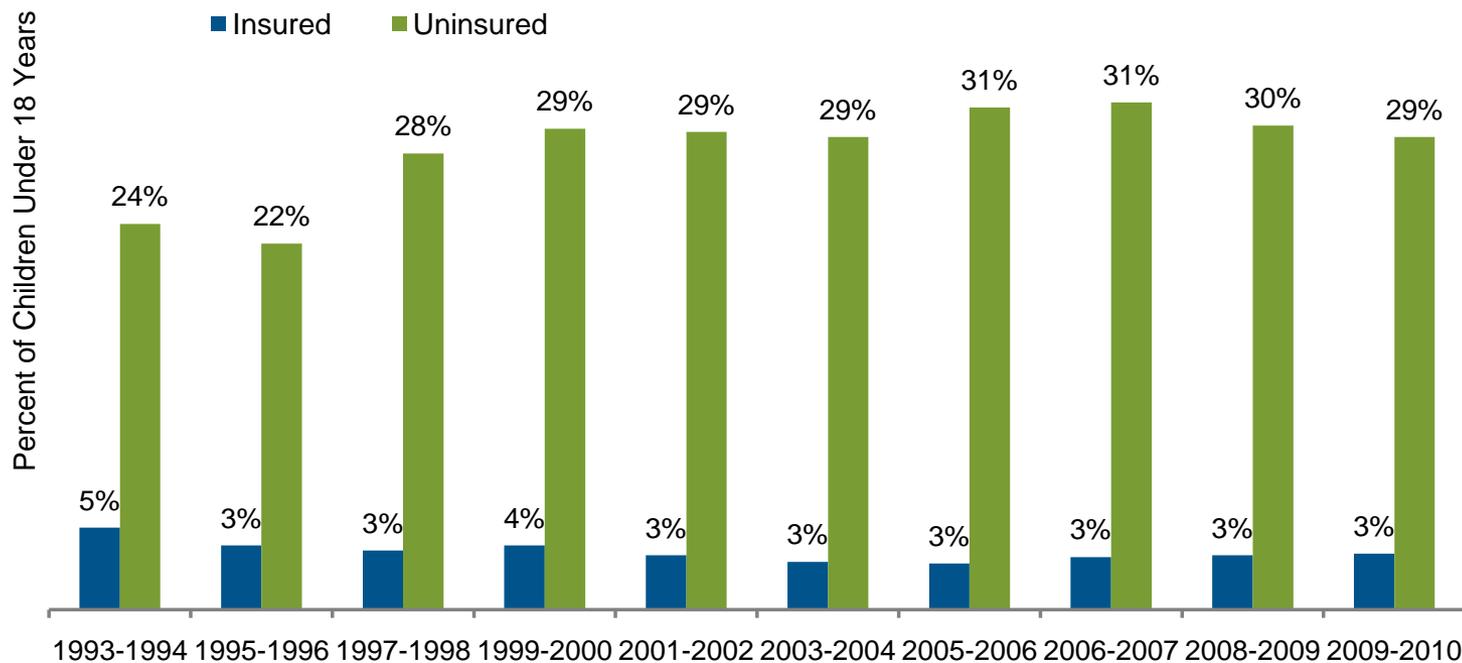


Source: National Center for Health Statistics. (2012). *Health, United States, 2011*. Hyattsville, MD.

(1) Includes individuals of Hispanic and non-Hispanic origin.

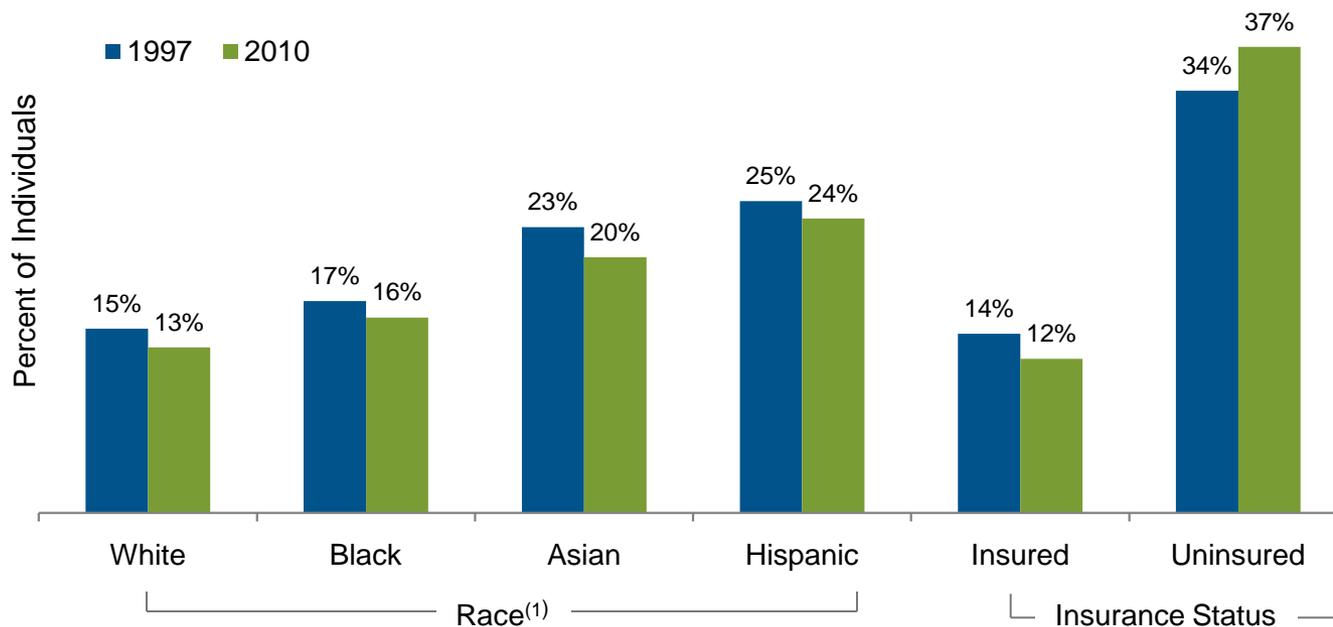
(2) Includes individuals of non-Hispanic origin only.

### Chart 7.17: Percent of Children with No Usual Source of Care by Insurance Status, 1993 – 2010



Source: National Center for Health Statistics. (2012). *Health, United States, 2011*. Hyattsville, MD.

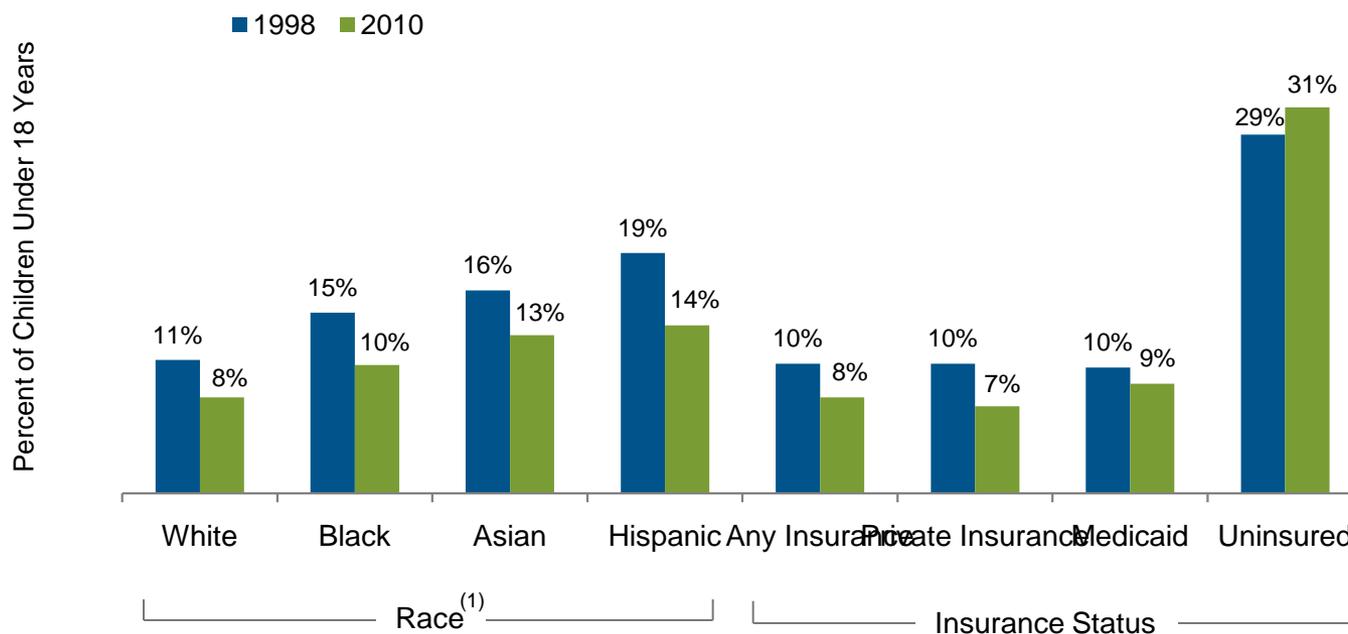
### Chart 7.18: Percent of Individuals with No Health Care Visits by Race, Insurance Status, 1997 and 2010



Source: National Center for Health Statistics. (2012). *Health, United States, 2011*. Hyattsville, MD.

(1) White and Black include individuals of non-Hispanic origin only. Asian includes individuals of Hispanic and non-Hispanic origin.

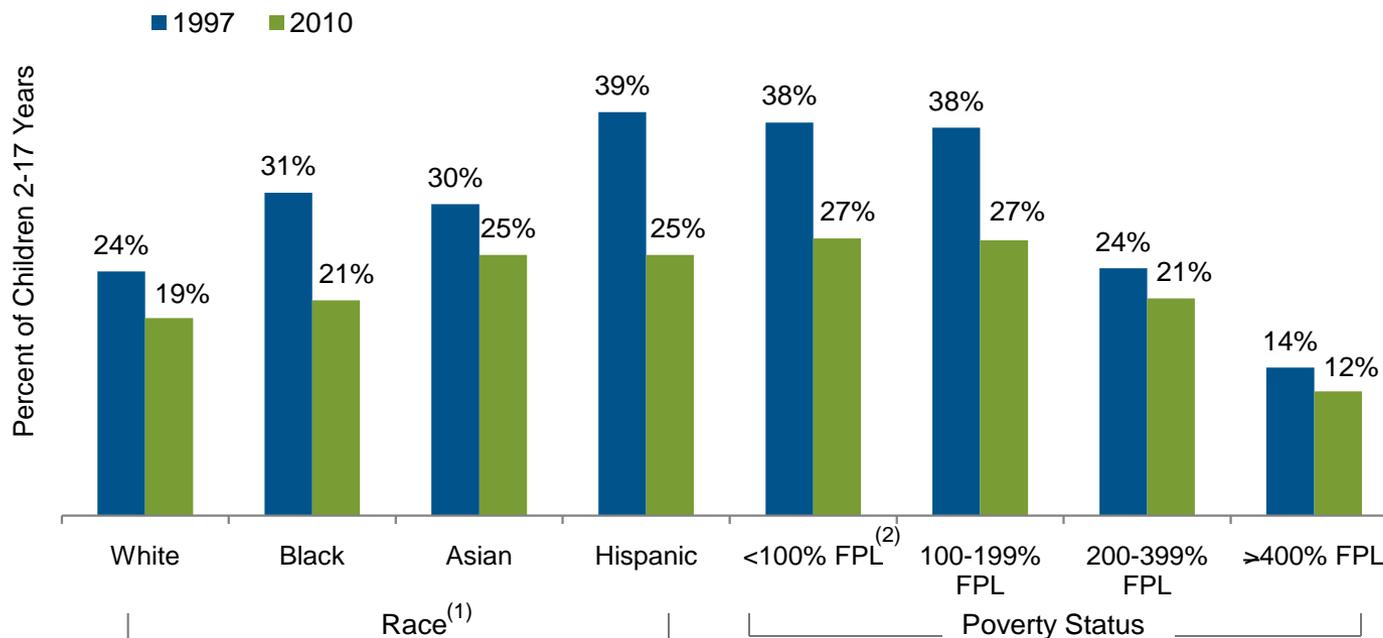
### Chart 7.19: Percent of Children with No Health Care Visits by Race, Insurance Status, 1998 and 2010



Source: National Center for Health Statistics. (2012). *Health, United States, 2011*. Hyattsville, MD.

<sup>(1)</sup> White and Black include individuals of non-Hispanic origin only. Asian includes individuals of Hispanic and non-Hispanic origin.

### Chart 7.20: Percent of Children with No Dental Visits by Race, Poverty Status, 1997 and 2010

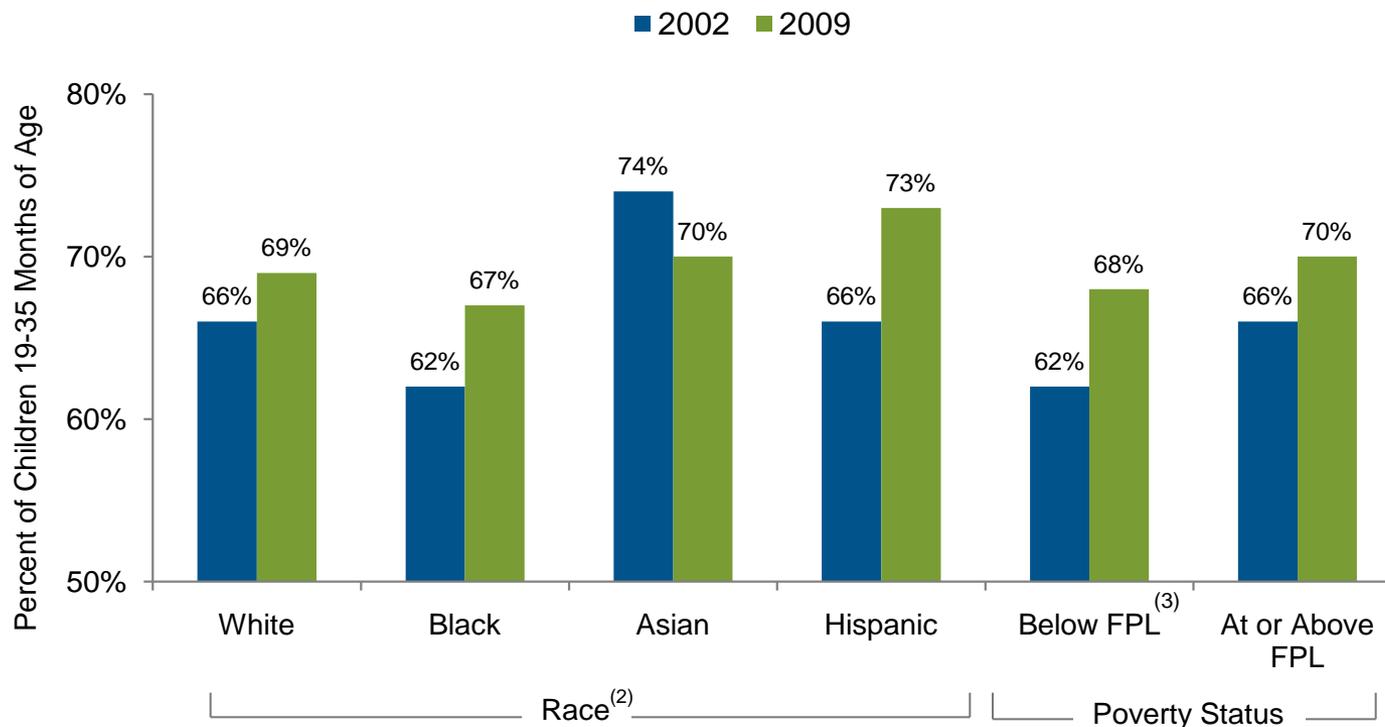


Source: National Center for Health Statistics. (2012). *Health, United States, 2011*. Hyattsville, MD.

(1) White and Black include individuals of non-Hispanic origin only. Asian includes individuals of Hispanic and non-Hispanic origin.

(2) FPL = federal poverty limit.

Chart 7.21: Percent of Children Vaccinated<sup>(1)</sup> by Race, Poverty Status, 2002 and 2009



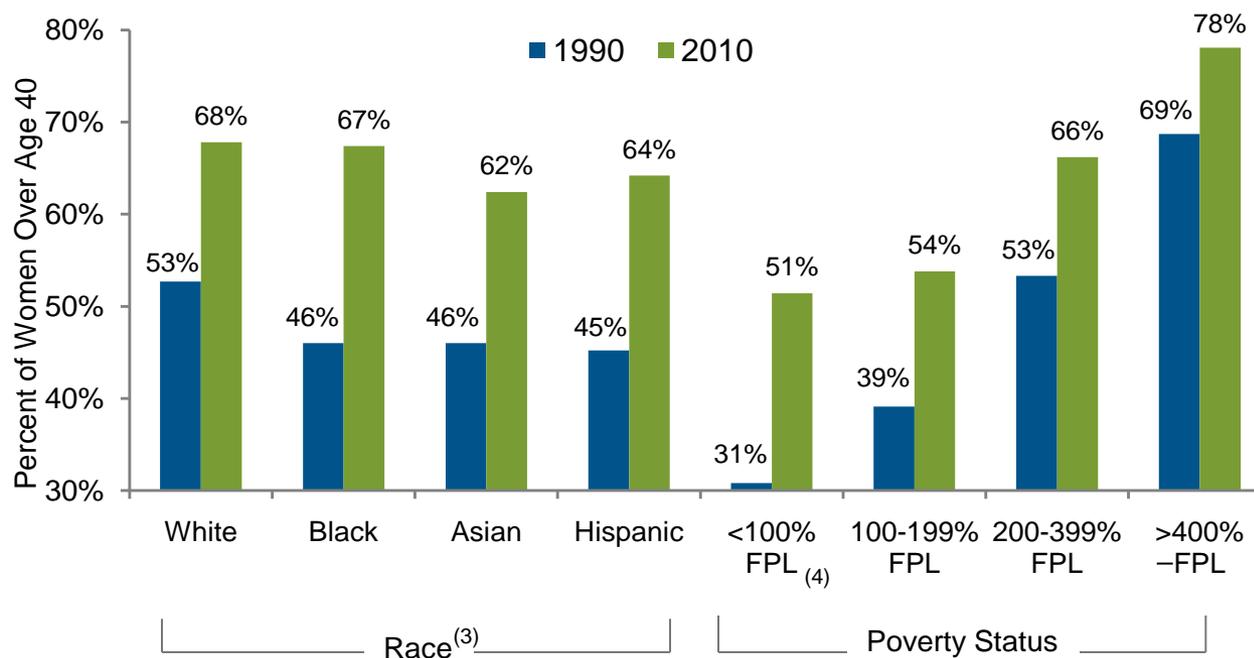
Source: National Center for Health Statistics. (2012). *Health, United States, 2011*. Hyattsville, MD.

(1) Vaccinations include DTP, Polio, MMR, Hib, Hepatitis B, Varicella, and PCV.

(2) White, Black, and Asian include individuals of non-Hispanic origin only.

(3) FPL = federal poverty limit.

Chart 7.22: Percent of Women<sup>(1)</sup> Receiving Mammography<sup>(2)</sup> by Race, Poverty Status, 1990 and 2010



Source: National Center for Health Statistics. (2012). *Health, United States, 2011*. Hyattsville, MD.

(1) Women over 40 years of age.

(2) Indicates use of mammography in two years prior to 1990 and 2010.

(3) White and Black include individuals of non-Hispanic origin only. Asian includes individuals of Hispanic and non-Hispanic origin.

(4) FPL = federal poverty limit.



# APPENDIX 1

Supplementary Data Tables  
Trends in the Overall  
Health Care Market

Table 1.1: Total National Health Expenditures, 1980 – 2010<sup>(1)</sup>

Year	Total National Health Expenditures				Prescription Drugs Total	
	Total		Per Capita		Nominal Dollars (billions)	Real Dollars <sup>(2)</sup> (billions)
	Nominal Dollars (billions)	Real Dollars <sup>(2)</sup> (billions)	Nominal Dollars	Real Dollars <sup>(2)</sup>		
1980	\$255.8	\$255.8	\$1,110	\$1,110	\$12.0	\$12.0
1981	\$296.8	\$269.0	\$1,275	\$1,156	\$13.4	\$12.1
1982	\$334.7	\$285.8	\$1,424	\$1,216	\$15.0	\$12.8
1983	\$369.0	\$305.3	\$1,555	\$1,286	\$17.3	\$14.3
1984	\$406.5	\$322.4	\$1,698	\$1,347	\$19.6	\$15.6
1985	\$444.6	\$340.5	\$1,840	\$1,409	\$21.8	\$16.7
1986	\$476.9	\$358.5	\$1,955	\$1,470	\$24.3	\$18.3
1987	\$519.1	\$376.5	\$2,109	\$1,530	\$26.9	\$19.5
1988	\$581.7	\$405.2	\$2,341	\$1,631	\$30.6	\$21.3
1989	\$647.5	\$430.3	\$2,581	\$1,715	\$34.8	\$23.1
1990	\$724.3	\$456.6	\$2,854	\$1,799	\$40.3	\$25.4
1991	\$791.5	\$478.9	\$3,082	\$1,865	\$44.4	\$26.9
1992	\$857.9	\$503.9	\$3,300	\$1,938	\$47.0	\$27.6
1993	\$921.5	\$525.5	\$3,504	\$1,998	\$49.6	\$28.3
1994	\$972.7	\$540.8	\$3,659	\$2,034	\$53.1	\$29.5
1995	\$1,027.5	\$555.5	\$3,825	\$2,068	\$59.8	\$32.3
1996	\$1,081.9	\$568.2	\$3,988	\$2,094	\$68.1	\$35.8
1997	\$1,142.6	\$586.6	\$4,169	\$2,140	\$77.6	\$39.9
1998	\$1,209.0	\$611.2	\$4,367	\$2,208	\$88.4	\$44.7
1999	\$1,286.6	\$636.4	\$4,601	\$2,276	\$104.7	\$51.8
2000	\$1,377.2	\$659.0	\$4,878	\$2,334	\$120.9	\$57.9
2001	\$1,494.1	\$695.2	\$5,241	\$2,439	\$138.7	\$64.5
2002	\$1,636.4	\$749.5	\$5,687	\$2,605	\$158.2	\$72.4
2003	\$1,774.3	\$794.6	\$6,114	\$2,738	\$176.0	\$78.8
2004	\$1,900.0	\$828.8	\$6,488	\$2,830	\$192.2	\$83.8
2005	\$2,029.1	\$856.1	\$6,868	\$2,898	\$204.8	\$86.4
2006	\$2,162.4	\$883.8	\$7,251	\$2,964	\$224.2	\$91.6
2007	\$2,297.1	\$912.9	\$7,628	\$3,031	\$236.2	\$93.9
2008	\$2,403.9	\$920.0	\$7,911	\$3,028	\$243.6	\$93.2
2009	\$2,495.8	\$958.6	\$8,149	\$3,130	\$256.1	\$98.4
2010	\$2,593.6	\$980.1	\$8,402	\$3,175	\$259.1	\$97.9

Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released January 9, 2012.

<sup>(1)</sup> 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>.

<sup>(2)</sup> Expressed in 1980 dollars; adjusted using the overall Consumer Price Index for Urban Consumers. Data for Charts 1.1, 1.3, and 1.10

Table 1.2: Percent Change in National Expenditures for Selected Health Services and Supplies, 2000 – 2010<sup>(1)</sup>

Year	Hospital Care	Prescription Drugs	Admin. & Net Cost of Private Health Insurance	Home Health Care	Nursing Home Care
2000	5.6%	15.4%	15.1%	-1.4%	5.4%
2001	8.1%	14.7%	10.8%	6.2%	6.7%
2002	8.3%	14.0%	22.8%	6.4%	4.1%
2003	8.2%	11.3%	17.8%	8.7%	6.2%
2004	7.6%	9.2%	7.0%	10.1%	5.4%
2005	7.7%	6.5%	7.1%	11.2%	6.3%
2006	7.0%	9.5%	9.9%	8.0%	4.3%
2007	6.2%	5.3%	3.6%	9.9%	7.8%
2008	5.3%	3.1%	-1.6%	6.4%	4.9%
2009	6.4%	5.1%	-1.7%	7.5%	4.5%
2010	4.9%	1.2%	7.2%	6.2%	3.2%

Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released January 9, 2012.

<sup>(1)</sup> 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/nationalhealththexpenddata/downloads/benchmark2009.pdf>.

Data for Chart 1.7

Table 1.3: National Health Expenditures,<sup>(1)</sup> 1980 – 2021<sup>(2)</sup>

Year	Expenditures (billions)
1980	\$255.8
1990	\$724.3
2000	\$1,377.2
2001	\$1,494.1
2002	\$1,636.4
2003	\$1,774.3
2004	\$1,900.0
2005	\$2,029.1
2006	\$2,162.4
2007	\$2,297.1
2008	\$2,403.9
2009	\$2,495.8
2010	\$2,593.6
2011	\$2,695.0
2012	\$2,809.0
2013	\$2,915.5
2014	\$3,130.2
2015	\$3,307.6
2016	\$3,514.4
2017	\$3,723.3
2018	\$3,952.3
2019	\$4,207.3
2020	\$4,487.2
2021	\$4,781.0

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

<sup>(1)</sup> Years 2011 – 2021 are projections.

<sup>(2)</sup> 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/nationalhealthspenddata/downloads/benchmark2009.pdf>.

Data for Chart 1.8

Table 1.4: Consumer Out-of-pocket Payments for National Health Expenditures, 1990 – 2010<sup>(1)</sup>

Year	Payment (billions)
1990	\$138.7
1991	\$141.7
1992	\$144.2
1993	\$145.3
1994	\$143.5
1995	\$146.4
1996	\$152.2
1997	\$163.8
1998	\$179.4
1999	\$190.5
2000	\$201.8
2001	\$209.1
2002	\$222.2
2003	\$236.8
2004	\$248.9
2005	\$263.4
2006	\$271.9
2007	\$287.3
2008	\$294.0
2009	\$294.4
2010	\$299.7

Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released January 9, 2012.

<sup>(1)</sup> 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>.

Data for Chart 1.9

Table 1.5: Growth in Total Prescription Drug Spending as a Percentage of Total Growth in National Health Expenditures, 1990 – 2010<sup>(1)</sup>

Year	Percentage
1990	7.20%
1991	6.08%
1992	3.95%
1993	4.07%
1994	6.78%
1995	12.32%
1996	15.31%
1997	15.61%
1998	16.27%
1999	21.02%
2000	17.84%
2001	15.22%
2002	13.69%
2003	12.95%
2004	12.86%
2005	9.74%
2006	14.58%
2007	8.90%
2008	6.91%
2009	13.63%
2010	3.02%

Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released January 9, 2012.

<sup>(1)</sup> 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>.

Data for Chart 1.11

Table 1.6: Consumer Out-of-pocket Spending vs. Private Health Insurance Spending for Prescription Drugs, 1990 – 2010<sup>(1)</sup>

Year	Out-of-pocket Payment (billions)	Private Health Insurance (billions)
1990	\$22.871	\$10.862
1991	\$23.557	\$13.217
1992	\$23.669	\$14.790
1993	\$23.897	\$16.218
1994	\$23.289	\$19.151
1995	\$23.358	\$24.384
1996	\$24.479	\$29.948
1997	\$26.008	\$35.920
1998	\$27.812	\$42.326
1999	\$30.894	\$51.898
2000	\$33.993	\$60.680
2001	\$36.706	\$70.598
2002	\$41.196	\$79.649
2003	\$45.566	\$86.273
2004	\$48.345	\$94.364
2005	\$51.621	\$101.645
2006	\$51.271	\$102.160
2007	\$53.038	\$106.767
2008	\$51.033	\$110.131
2009	\$50.842	\$117.195
2010	\$48.753	\$117.003

Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released January 9, 2012.

<sup>(1)</sup> 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/nationalhealthpenddata/downloads/benchmark2009.pdf>.

Data for Chart 1.12

Table 1.7: Number and Percent Uninsured, 1990 – 2010

Year	Number (millions)	Percent
1990	34.7	13.9%
1991	35.4	14.1%
1992	38.6	15.0%
1993	39.7	15.3%
1994	39.7	15.2%
1995	40.6	15.4%
1996	41.7	15.6%
1997	43.4	16.1%
1998	44.3	16.3%
1999	40.2	14.5%
2000	39.8	14.2%
2001	41.2	14.6%
2002	43.6	15.2%
2003	45.0	15.6%
2004	43.5	14.9%
2005	44.8	15.3%
2006	47.0	15.8%
2007	45.7	15.3%
2008	46.3	15.4%
2009	49.0	16.7%
2010	49.9	16.3%

Source: US Census Bureau, Income, Poverty, and Health Insurance Coverage in the United States: 2010. Data released August 2011. Table 8. People Without Health Insurance Coverage by Selected Characteristics: 2009 and 2010. Link: <http://www.census.gov/hhes/www/hlthins/data/incpovhlth/2010/table8.pdf>.

Data for Chart 1.15

Table 1.8: Average Percent Uninsured by State, 2008 – 2010

State	Average Percent Uninsured	State	Average Percent Uninsured
Alabama	14.4	Montana	16.3
Alaska	18.3	Nebraska	11.8
Arizona	19.1	Nevada	20.0
Arkansas	18.5	New Hampshire	10.1
California	18.9	New Jersey	14.4
Colorado	14.3	New Mexico	21.8
Connecticut	10.5	New York	14.2
Delaware	11.7	North Carolina	16.7
District of Columbia	11.4	North Dakota	11.7
Florida	20.7	Ohio	12.9
Georgia	19.0	Oklahoma	16.3
Hawaii	7.5	Oregon	16.5
Idaho	16.6	Pennsylvania	10.5
Illinois	13.8	Rhode Island	11.5
Indiana	12.8	South Carolina	17.6
Iowa	10.7	South Dakota	12.8
Kansas	12.5	Tennessee	14.7
Kentucky	15.5	Texas	24.8
Louisiana	18.0	Utah	13.2
Maine	9.9	Vermont	9.4
Maryland	12.6	Virginia	12.9
Massachusetts	5.0	Washington	12.8
Michigan	12.5	West Virginia	13.9
Minnesota	8.7	Wisconsin	9.2
Mississippi	18.7	Wyoming	15.3
Missouri	13.7		

Source: US Census Bureau, Income, Poverty, and Health Insurance Coverage in the United States: 2010 Data released August 2011. Link: <http://www.census.gov/hhes/www/hlthins/data/incpovhlth/2010/state.xls>.

Data for Chart 1.16

Table 1.9: Medicaid Enrollees,<sup>(1)</sup> 1990, 1995, 2000 – 2011

Year	Aged (millions)	Blind/Disabled (millions)	Children (millions)	Adults (millions)	Other Title XIX (millions)	Total (millions)
1990	3.2	3.7	11.2	6.0	1.1	25.3
1995	4.2	6.0	17.6	7.8	0.6	36.3
2000	4.6	7.5	22.0	10.4		44.5
2001	4.8	8.0	23.7	12.0		48.4
2002	4.5	7.9	25.5	12.9		50.9
2003	4.8	8.3	25.3	14.0		52.4
2004	5.1	8.9	27.8	15.4		57.3
2005	5.4	9.4	28.3	15.5		58.6
2006	5.5	9.8	29.5	16.0		60.9
2007	5.6	9.6	29.5	15.7		60.5
2008	5.6	9.6	30.6	16.3		62.1
2009	5.8	10.0	34.0	18.0		67.8
2010	5.5	10.4	33.5	18.3		67.7
2011	5.5	10.8	34.3	18.9		69.5

Source: Congressional Budget Office. Data released February 2011. Spending and Enrollment Detail for CBO's March 2011 Baseline: Medicaid. Link: <http://www.cbo.gov/budget/factsheets/2011b/medicaid.pdf>.

<sup>(1)</sup> Does not include CHIP Enrollees.

Data for Chart 1.18

Table 1.10: Percent Change in CHIP Enrollment by State, FY 2009 – FY 2010<sup>(1)</sup>

State	Percent Change FY 09 - FY 10	State	Percent Change FY 09 - FY 10
Alabama	25%	Montana	-2%
Alaska	7%	Nebraska	0%
Arizona	-40%	Nevada	-7%
Arkansas	-1%	New Hampshire	-19%
California	-1%	New Jersey	12%
Colorado	4%	New Mexico	-14%
Connecticut	-4%	New York	1%
Delaware	2%	North Carolina	-2%
District of Columbia	-13%	North Dakota	3%
Florida	-3%	Ohio	-5%
Georgia	-2%	Oklahoma	-1%
Hawaii	10%	Oregon	25%
Idaho	-5%	Pennsylvania	3%
Illinois	-13%	Rhode Island	19%
Indiana	-1%	South Carolina	-14%
Iowa	22%	South Dakota	4%
Kansas	17%	Tennessee	-2%
Kentucky	9%	Texas	7%
Louisiana	-8%	Utah	4%
Maine	5%	Vermont	-1%
Maryland	-5%	Virginia	4%
Massachusetts	-1%	Washington	31%
Michigan	-3%	West Virginia	-2%
Minnesota	-6%	Wisconsin	5%
Mississippi	10%	Wyoming	-6%
Missouri	-17%		

Source: Centers for Medicare & Medicaid Services. Data released February 2011. Number of Children Ever Enrolled by Program Type. [http://www.cms.gov/NationalCHIPPolicy/downloads/FY2010StateCHIPTotalTable\\_020111\\_FINAL.pdf](http://www.cms.gov/NationalCHIPPolicy/downloads/FY2010StateCHIPTotalTable_020111_FINAL.pdf).

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

Data for Chart 1.20

Table 1.11: Percentage of Employees with Employer-based Coverage Who Can Choose Conventional, PPO, HMO, POS, and HDHP/SO Plans, 1988 – 2011

	1988	1996	1999	2002	2005	2006	2007	2008	2009	2010	2011
<b>Conventional<sup>(1)</sup></b>	90%	52%	26%	14%	12%	10%	10%	8%	5%	6%	7%
<b>PPO</b>	18%	45%	62%	74%	82%	79%	79%	77%	80%	79%	76%
<b>HMO</b>	46%	64%	56%	50%	44%	43%	42%	41%	44%	42%	39%
<b>POS<sup>(2)</sup></b>		30%	45%	34%	28%	23%	21%	24%	19%	14%	16%
<b>HDHP/SO<sup>(3)</sup></b>						14%	18%	25%	28%	32%	40%

Source: The Kaiser Family Foundation and Health Research and Educational Trust. Data Released 2011. Employer Health Benefits: 1999, 2002, 2005, 2006, 2007, 2008, 2009, 2010, 2011. Link: <http://ehbs.kff.org/pdf/2011/8225.pdf>. KPMG Survey of Employer-Sponsored Health Benefits: 1988, 1996.

(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.

Data for Chart 1.21

Table 1.12: Percent Distribution of Employer-sponsored Health Insurance Enrollment by Type of Plan, 1988 – 2011

	1988	1996	1999	2002	2005	2006	2007	2008	2009	2010	2011
<b>Conventional<sup>(1)</sup></b>	73%	27%	10%	4%	3%	3%	3%	2%	1%	1%	1%
<b>PPO</b>	11%	28%	39%	52%	61%	60%	57%	58%	60%	58%	55%
<b>HMO</b>	16%	31%	28%	27%	21%	20%	21%	20%	20%	19%	17%
<b>POS<sup>(2)</sup></b>		14%	24%	18%	15%	13%	13%	12%	10%	8%	10%
<b>HDHP/SO<sup>(3)</sup></b>						4%	5%	8%	8%	13%	17%

Source: The Kaiser Family Foundation and Health Research and Educational Trust. Data Released 2011. Employer Health Benefits: 1999, 2002, 2005, 2006, 2007, 2008, 2009, 2010, 2011. Link: <http://ehbs.kff.org/pdf/2011/8225.pdf>. KPMG Survey of Employer-Sponsored Health Benefits: 1988, 1996.

(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.

Data for Chart 1.22

Table 1.13: Growth in Medicare Spending per Beneficiary vs. Private Health Insurance Spending per Enrollee, 1990 – 2010<sup>(1,2)</sup>

Year	Growth in Medicare Spending per Beneficiary	Growth in Private Health Insurance Spending per Enrollee
1990	7.2%	14.8%
1991	5.8%	10.2%
1992	8.8%	7.7%
1993	6.6%	4.6%
1994	7.6%	1.7%
1995	7.2%	1.6%
1996	4.6%	1.5%
1997	4.2%	3.4%
1998	0.2%	4.8%
1999	2.7%	4.4%
2000	3.2%	6.5%
2001	8.4%	8.6%
2002	5.3%	9.7%
2003	4.9%	9.2%
2004	6.7%	8.1%
2005	5.7%	6.7%
2006	3.6%	6.4%
2007	2.6%	5.1%
2008	4.8%	6.5%
2009	3.4%	6.4%
2010	1.5%	3.8%

Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Data released January 9, 2011.

- (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) Data reflects spending on benefits commonly covered by Medicare and Private Health Insurance.

Data for Chart 1.24

Table 1.14: Percentage of Medicaid Beneficiaries Enrolled in Medicaid Managed Care by State, 2009 and 2010

State	% Enrolled		State	% Enrolled	
	09	10		09	10
Alabama	66.5%	59.6%	Montana	66.6%	74.6%
Alaska	0.0%	0.0%	Nebraska	83.6%	85.6%
Arizona	89.6%	90.5%	Nevada	83.7%	85.1%
Arkansas	79.2%	78.4%	New Hampshire	77.6%	0.0%
California	52.2%	55.1%	New Jersey	74.9%	76.8%
Colorado	95.1%	94.6%	New Mexico	74.2%	73.1%
Connecticut	75.2%	69.9%	New York	66.2%	68.1%
Delaware	73.9%	77.4%	North Carolina	70.2%	77.5%
District of Columbia	97.8%	69.7%	North Dakota	67.6%	67.3%
Florida	66.0%	64.5%	Ohio	70.4%	73.5%
Georgia	92.0%	91.0%	Oklahoma	88.5%	90.1%
Hawaii	97.0%	98.0%	Oregon	88.1%	86.7%
Idaho	84.1%	87.6%	Pennsylvania	82.1%	81.7%
Illinois	55.1%	56.5%	Rhode Island	62.1%	67.4%
Indiana	74.0%	70.4%	South Carolina	100.0%	100.0%
Iowa	82.9%	90.1%	South Dakota	79.7%	80.3%
Kansas	86.6%	86.6%	Tennessee	100.0%	100.0%
Kentucky	83.0%	88.2%	Texas	64.6%	67.0%
Louisiana	68.7%	63.7%	Utah	85.9%	83.3%
Maine	63.7%	67.7%	Vermont	87.8%	56.7%
Maryland	78.8%	79.5%	Virginia	63.9%	59.2%
Massachusetts	59.6%	53.5%	Washington	86.0%	86.7%
Michigan	88.8%	86.2%	West Virginia	46.0%	48.6%
Minnesota	63.1%	63.8%	Wisconsin	60.4%	62.4%
Mississippi	76.1%	75.9%	Wyoming	0.0%	0.0%
Missouri	98.7%	99.1%	<b>Nation</b>	<b>71.7%</b>	<b>71.5%</b>

Source: Centers for Medicare & Medicaid Services, Office of the Actuary. Medicaid Managed Care Enrollment Report as of June 30, 2009 and June 30, 2010.

Data for Chart 1.26

Table 1.15: Operating Margins of the Top Insurers, 2009 – 2011

	2009	2010	2011
<b>Aetna</b>	6.7%	8.7%	9.1%
<b>WellPoint</b>	8.0%	8.5%	7.4%
<b>United HealthCare</b>	7.3%	8.4%	8.3%
<b>Cigna</b>	11.7%	9.7%	10.0%
<b>Humana</b>	5.5%	5.5%	6.1%

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

Data for Chart 1.29



# APPENDIX 2

Supplementary Data Tables  
Organizational Trends

Table 2.1: Number of Community Hospitals,<sup>(1)</sup> 1990 – 2010

Year	All Hospitals	Urban <sup>(2)</sup>	Rural <sup>(2)</sup>	In Health System
1990	5,384	2,924	2,460	-
1991	5,342	2,921	2,421	-
1992	5,292	3,007	2,285	-
1993	5,261	3,012	2,249	-
1994	5,229	2,993	2,236	-
1995	5,194	2,958	2,236	-
1996	5,134	2,908	2,226	-
1997	5,057	2,852	2,205	-
1998	5,015	2,816	2,199	-
1999	4,956	2,767	2,189	2,524
2000	4,915	2,740	2,175	2,542
2001	4,908	2,742	2,166	2,580
2002	4,927	2,749	2,178	2,606
2003	4,895	2,729	2,166	2,626
2004	4,919	2,916	2,003	2,668
2005	4,936	2,927	2,009	2,716
2006	4,927	2,926	2,001	2,755
2007	4,897	2,900	1,997	2,730
2008	5,010	3,012	1,998	2,868
2009	5,008	3,011	1,997	2,921
2010	4,985	2,998	1,987	2,941

Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

<sup>(1)</sup> All nonfederal, short-term general, and specialty hospitals whose facilities and services are available to the public.

<sup>(2)</sup> Data on the number of urban and rural hospitals in 2004 and beyond were collected using coding different from previous years to reflect new Centers for Medicare & Medicaid Services wage area designations.

Data for Charts 2.1 and 2.4

Table 2.2: Number of Beds and Number of Beds per 1,000 Persons, 1990 – 2010

Year	Number of Beds	Beds per 1,000
1990	926,436	3.72
1991	922,822	3.66
1992	919,505	3.61
1993	917,847	3.56
1994	901,056	3.46
1995	871,976	3.32
1996	862,352	3.25
1997	853,287	3.19
1998	839,988	3.11
1999	829,575	3.04
2000	823,560	2.93
2001	825,966	2.90
2002	820,653	2.85
2003	813,307	2.80
2004	808,127	2.75
2005	802,311	2.71
2006	802,658	2.68
2007	800,892	2.66
2008	808,069	2.66
2009	805,593	2.62
2010	804,943	2.60

Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

Data for Chart 2.2

Table 2.3: Beds per 1,000 Persons by State, 2009 and 2010

State	Beds per 1,000 Persons		State	Beds per 1,000 Persons	
	09	10		09	10
Alabama	3.25	3.19	Montana	3.92	3.77
Alaska	2.19	2.18	Nebraska	4.14	4.00
Arizona	2.04	2.00	Nevada	1.94	1.96
Arkansas	3.31	3.25	New Hampshire	2.16	2.15
California	1.86	1.89	New Jersey	2.42	2.42
Colorado	2.06	2.00	New Mexico	1.95	1.95
Connecticut	2.26	2.29	New York	3.09	3.04
Delaware	2.40	2.42	North Carolina	2.43	2.43
District of Columbia	5.76	5.66	North Dakota	5.20	5.12
Florida	2.87	2.85	Ohio	2.95	2.98
Georgia	2.59	2.57	Oklahoma	3.07	3.00
Hawaii	2.29	2.42	Oregon	1.69	1.67
Idaho	2.19	2.16	Pennsylvania	3.11	3.16
Illinois	2.62	2.57	Rhode Island	2.39	2.35
Indiana	2.69	2.76	South Carolina	2.74	2.72
Iowa	3.42	3.33	South Dakota	5.10	5.01
Kansas	3.59	3.51	Tennessee	3.33	3.29
Kentucky	3.27	3.28	Texas	2.50	2.43
Louisiana	3.53	3.40	Utah	1.79	1.80
Maine	2.72	2.72	Vermont	2.08	2.07
Maryland	2.09	2.04	Virginia	2.22	2.23
Massachusetts	2.35	2.37	Washington	1.70	1.71
Michigan	2.59	2.58	West Virginia	4.07	4.00
Minnesota	2.96	2.90	Wisconsin	2.41	2.39
Mississippi	4.36	4.37	Wyoming	3.68	3.58
Missouri	3.19	3.12			

Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.  
 US Census Bureau: National and State Population Estimates, July 1, 2010.  
 Link: <http://www.census.gov/popest/data/intercensal/state/state2010.html>.

Data for Chart 2.3

Table 2.4: Percentage of Hospitals with Physician Affiliates<sup>(1)</sup> by Type of Relationship, 2000 – 2010

	00	01	02	03	04	05	06	07	08	09	10
<b>Physician Hospital Organization</b>	25%	23%	22%	21%	19%	19%	19%	19%	18%	16%	16%
<b>IPA</b>	17%	17%	16%	16%	15%	14%	14%	13%	12%	12%	11%
<b>Management Service Organization</b>	13%	11%	11%	10%	9%	9%	9%	9%	9%	9%	9%
<b>Group Practice without Walls</b>	4%	5%	4%	4%	3%	4%	3%	3%	3%	3%	3%

Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals. Previously Table 2.5 in 2009 and earlier years' Chartbooks.

<sup>(1)</sup> A hospital is considered to have a physician relationship if the relationship exists as part of the hospital or a system or network of which the hospital is a part.

Data for Chart 2.6

Table 2.5: Percentage of Hospitals with Insurance Products by Type of Insurance, 2000 – 2010

	00	01	02	03	04	05	06	07	08	09	10
<b>Preferred Provider Organization</b>	21%	18%	19%	19%	18%	19%	18%	17%	14%	14%	15%
<b>Health Maintenance Organization</b>	18%	15%	14%	14%	14%	14%	13%	13%	12%	12%	12%
<b>Indemnity or Fee for Service</b>	6%	5%	5%	6%	6%	6%	6%	6%	5%	5%	5%

Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals. Previously Table 2.6 in 2009 and earlier years' Chartbooks.

Data for Chart 2.7

Table 2.6: Percentage of Hospitals Offering “Non-hospital” Services,<sup>(1)</sup> 2000 – 2010

	00	01	02	03	04	05	06	07	08	09	10
<b>Home Health Service</b>	69%	66%	65%	64%	64%	63%	63%	63%	61%	61%	60%
<b>Skilled Nursing Facility</b>	49%	48%	46%	45%	43%	42%	42%	41%	40%	39%	37%
<b>Other Long-term Care</b>	11%	11%	12%	13%	14%	14%	14%	14%	14%	14%	12%
<b>Assisted Living</b>	15%	15%	15%	16%	16%	16%	16%	15%	15%	15%	15%
<b>Hospice</b>	54%	54%	55%	57%	59%	60%	62%	63%	62%	62%	61%
<b>Meals on Wheels</b>	26%	25%	25%	24%	24%	23%	23%	22%	22%	21%	21%

Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals. Previously Table 2.7 in 2009 and earlier years’ Chartbooks.

<sup>(1)</sup> Includes services offered in hospital, health system, network or joint venture.

Data for Chart 2.8



# APPENDIX 3

Supplementary Data Tables  
Utilization and Volume

Table 3.1: Trends in Inpatient Utilization in Community Hospitals, 1990 – 2010

Year	Inpatient Admissions in Community Hospitals	Inpatient Admissions per 1,000	Total Inpatient Days in Community Hospitals	Inpatient Days per 1,000	Inpatient Surgeries	Average Length of Stay
1990	31,181,046	125.3	225,971,653	908.4	10,844,916	7.2
1991	31,064,283	123.2	222,858,470	883.9	10,693,243	7.2
1992	31,033,557	121.7	221,047,104	866.8	10,552,378	7.1
1993	30,748,051	119.3	215,888,741	837.6	10,181,703	7.0
1994	30,718,136	118.0	207,180,278	796.0	9,833,938	6.7
1995	30,945,357	117.8	199,876,367	760.7	9,700,613	6.5
1996	31,098,959	117.2	193,747,004	730.4	9,545,612	6.2
1997	31,576,960	118.0	192,504,015	719.3	9,509,081	6.1
1998	31,811,673	117.8	191,430,450	709.0	9,735,705	6.0
1999	32,359,042	118.7	191,884,270	703.7	9,539,593	5.9
2000	33,089,467	117.6	192,420,368	683.7	9,729,336	5.8
2001	33,813,589	118.7	194,106,316	681.6	9,779,583	5.7
2002	34,478,280	119.7	196,690,099	682.7	10,105,010	5.7
2003	34,782,742	119.6	196,649,769	676.2	9,940,922	5.7
2004	35,086,061	119.5	197,564,172	672.8	10,050,346	5.6
2005	35,238,673	119.2	197,073,770	666.4	10,097,271	5.6
2006	35,377,659	118.2	196,366,512	655.9	10,095,683	5.6
2007	35,345,986	117.3	194,549,348	645.7	10,189,630	5.5
2008	35,760,750	117.6	196,078,468	644.9	10,105,156	5.5
2009	35,527,377	115.7	192,656,804	627.5	10,100,980	5.4
2010	35,149,427	113.7	189,593,349	613.5	9,954,821	5.4

Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals. US Census Bureau: National and State Population Estimates, July 1, 2010.  
Link: <http://www.census.gov/popest/data/intercensal/state/state2010.html>.

Data for Charts 3.1, 3.2, 3.3, 3.4, 3.5, and 3.14

Table 3.2: Average Length of Stay in Community Hospitals by State, 2009 and 2010

State	Average Length of Stay		State	Average Length of Stay	
	09	10		09	10
Alabama	5.2	5.2	Montana	8.6	8.7
Alaska	5.9	6.0	Nebraska	7.4	7.0
Arizona	4.5	4.4	Nevada	5.3	5.4
Arkansas	5.1	5.2	New Hampshire	5.3	5.2
California	5.1	5.1	New Jersey	5.1	5.1
Colorado	5.0	5.0	New Mexico	4.6	4.5
Connecticut	5.8	5.6	New York	6.9	6.9
Delaware	5.9	5.7	North Carolina	5.6	5.6
District of Columbia	6.7	7.0	North Dakota	8.1	7.6
Florida	5.0	5.0	Ohio	5.1	5.0
Georgia	6.3	6.4	Oklahoma	5.4	5.5
Hawaii	6.9	7.5	Oregon	4.4	4.3
Idaho	4.8	4.8	Pennsylvania	5.4	5.4
Illinois	5.0	4.9	Rhode Island	5.2	5.0
Indiana	5.2	5.2	South Carolina	5.6	5.7
Iowa	6.2	6.0	South Dakota	9.8	9.2
Kansas	6.4	6.4	Tennessee	5.6	5.5
Kentucky	5.2	5.2	Texas	5.2	5.2
Louisiana	5.5	5.3	Utah	4.4	4.4
Maine	5.5	5.5	Vermont	6.3	6.2
Maryland	4.5	4.5	Virginia	5.5	5.5
Massachusetts	5.1	5.1	Washington	4.5	4.5
Michigan	5.2	5.1	West Virginia	5.9	5.8
Minnesota	6.0	6.1	Wisconsin	5.1	5.0
Mississippi	6.3	6.3	Wyoming	7.9	8.0
Missouri	5.2	5.1			

Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

Data for Chart 3.6

Table 3.3: Emergency Department Visits, Emergency Department Visits per 1,000, and Number of Emergency Departments, 1991 – 2010

Year	ED Visits (millions)	ED Visits per 1,000	Emergency Departments <sup>(1)</sup>
1991	88.5	351	5,108
1992	90.8	356	5,035
1993	92.6	359	4,998
1994	90.5	348	4,960
1995	94.7	360	4,923
1996	93.1	351	4,884
1997	92.8	347	4,813
1998	94.8	351	4,771
1999	99.5	365	4,679
2000	103.1	366	4,650
2001	106.0	372	4,621
2002	110.0	382	4,620
2003	111.0	382	4,570
2004	112.6	383	4,595
2005	114.8	388	4,611
2006	118.4	395	4,587
2007	120.8	401	4,565
2008	123.0	405	4,613
2009	127.3	415	4,594
2010	127.2	412	4,564

Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals. US Census Bureau: National and State Population Estimates, July 1, 2010.  
 Link: <http://www.census.gov/popest/data/intercensal/state/state2010.html>.

<sup>(1)</sup> Defined as hospitals reporting ED visits in the AHA Annual Survey.

Data for Charts 3.7 and 3.8

Table 3.4: Outpatient Utilization in Community Hospitals, 1990 – 2010

Year	Total Outpatient Visits	Outpatient Visits per 1,000	Outpatient Surgeries
1990	300,514,516	1,208.0	11,069,952
1991	321,044,324	1,273.4	11,711,808
1992	347,847,202	1,364.1	12,307,594
1993	366,533,432	1,422.0	12,624,292
1994	382,780,358	1,470.6	13,154,838
1995	413,748,403	1,574.6	13,462,304
1996	439,863,107	1,658.3	14,023,651
1997	450,140,010	1,681.9	14,678,290
1998	474,193,468	1,756.3	15,593,614
1999	495,346,286	1,816.5	15,845,492
2000	521,404,976	1,852.8	16,383,374
2001	538,480,378	1,890.8	16,684,726
2002	556,404,212	1,931.1	17,361,176
2003	563,186,046	1,936.7	17,165,616
2004	571,569,334	1,946.4	17,351,490
2005	584,428,736	1,976.1	17,445,587
2006	599,553,025	2,002.5	17,235,141
2007	603,300,374	2,002.4	17,146,334
2008	624,098,296	2,052.6	17,354,282
2009	641,953,442	2,091.0	17,357,534
2010	651,423,717	2,107.8	17,357,177

Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

Data for Charts 3.12, 3.13, and 3.14



# APPENDIX 4

Supplementary Data Tables  
Trends in Hospital Financing

Table 4.1: Aggregate Total Hospital Margins,<sup>(1)</sup> Operating Margins,<sup>(2)</sup> and Patient Margins;<sup>(3)</sup> Percentage of Hospitals with Negative Total Margins; and Aggregate Non-operating Gains as a Percentage of Total Net Revenue, 1990 – 2010

Year	Aggregate Total Hospital Margins	Aggregate Operating Margins	Aggregate Patient Margins	Percent of Hospitals with Negative Total Margins	Percent of Hospitals with Negative Operating Margins	Aggregate Non-operating Gains as a Percentage of Total Net Revenue
1990	3.8%	1.7%	-4.2%	27.1%		2.1%
1991	4.3%	2.2%	-3.6%	24.7%		2.1%
1992	4.6%	2.7%	-2.7%	23.8%		1.9%
1993	4.2%	2.5%	-3.2%	24.2%		1.8%
1994	4.8%	3.4%	-2.8%	22.4%		1.5%
1995	5.6%	3.9%	-2.2%	20.4%	28.0%	1.8%
1996	6.7%	4.6%	-1.0%	19.4%	27.7%	2.3%
1997	6.7%	4.0%	-1.7%	20.4%	28.9%	2.7%
1998	5.8%	3.1%	-3.0%	26.6%	36.1%	2.8%
1999	4.6%	2.1%	-4.3%	32.5%	41.9%	2.6%
2000	4.6%	2.0%	-4.2%	32.0%	42.2%	2.6%
2001	4.2%	2.7%	-3.6%	29.4%	36.7%	1.6%
2002	4.4%	3.7%	-2.3%	29.3%	33.4%	0.8%
2003	4.8%	3.3%	-2.8%	29.9%	35.9%	1.5%
2004	5.2%	3.6%	-2.3%	26.5%	33.4%	1.7%
2005	5.3%	3.7%	-2.0%	25.4%	32.0%	1.7%
2006	6.0%	4.0%	-2.1%	24.3%	31.8%	2.1%
2007	6.9%	4.3%	-1.7%	21.6%	30.2%	2.7%
2008	2.6%	3.3%	-2.6%	32.4%	32.8%	-0.7%
2009	5.0%	4.4%	-1.4%	27.5%	30.1%	0.6%
2010	7.2%	5.5%	-0.2%	22.8%	28.3%	1.8%

Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

<sup>(1)</sup> Total Hospital Margin is calculated as the difference between total net revenue and total expenses divided by total net revenue.

<sup>(2)</sup> Operating Margin is calculated as the difference between operating revenue and total expenses divided by operating revenue.

<sup>(3)</sup> Patient Margin is calculated as the difference between net patient revenue and total expenses divided by net patient revenue.

Data for Charts 4.1, 4.2, and 4.8



Table 4.2: Distribution of Inpatient vs. Outpatient Revenues, 1990 – 2010

Year	Gross Outpatient Revenue	Gross Inpatient Revenue
1990	23%	77%
1991	24%	76%
1992	25%	75%
1993	27%	73%
1994	28%	72%
1995	30%	70%
1996	31%	69%
1997	33%	67%
1998	33%	67%
1999	34%	66%
2000	35%	65%
2001	35%	65%
2002	35%	65%
2003	35%	65%
2004	36%	64%
2005	37%	63%
2006	38%	62%
2007	38%	62%
2008	39%	61%
2009	41%	59%
2010	42%	58%

Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

Data for Chart 4.3

Table 4.3: Annual Change in Hospital Operating Revenue and Expenses per Adjusted Admission,<sup>(1)</sup> 1990 – 2010

Year	Expenses per Adjusted Admission	Operating Revenue per Adjusted Admission	Percent Change Expenses	Percent Change Operating Revenue
1990	\$4,947	\$5,034	7.8%	8.8%
1991	\$5,360	\$5,481	8.3%	8.9%
1992	\$5,794	\$5,958	8.1%	8.7%
1993	\$6,132	\$6,290	5.8%	5.6%
1994	\$6,230	\$6,446	1.6%	2.5%
1995	\$6,216	\$6,466	-0.2%	0.3%
1996	\$6,225	\$6,522	0.2%	0.9%
1997	\$6,262	\$6,526	0.6%	0.1%
1998	\$6,386	\$6,589	2.0%	1.0%
1999	\$6,509	\$6,647	1.9%	0.9%
2000	\$6,668	\$6,806	2.5%	2.4%
2001	\$6,980	\$7,172	4.7%	5.4%
2002	\$7,355	\$7,636	5.4%	6.5%
2003	\$7,796	\$8,065	6.0%	5.6%
2004	\$8,166	\$8,469	4.7%	5.0%
2005	\$8,535	\$8,865	4.5%	4.7%
2006	\$8,970	\$9,345	5.1%	5.4%
2007	\$9,377	\$9,797	4.5%	4.8%
2008	\$9,788	\$10,123	4.4%	3.3%
2009	\$10,045	\$10,503	2.6%	3.7%
2010	\$10,313	\$10,917	2.7%	3.9%

Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

<sup>(1)</sup> An aggregate measure of workload reflecting the number of inpatient admissions, plus an estimate of the volume of outpatient services, expressed in units equivalent to an inpatient admission in terms of level of effort.

Data for Chart 4.4

Table 4.4: Aggregate Hospital Payment-to-cost Ratios for Private Payers, Medicare and Medicaid, 1990 – 2010

Year	Medicare	Medicaid <sup>(1)</sup>	Private Payer
1990	89.4%	80.1%	127.8%
1991	88.5%	81.9%	130.8%
1992	89.0%	89.5%	131.8%
1993	89.9%	89.6%	130.1%
1994	96.9%	93.7%	124.4%
1995	99.4%	94.0%	124.0%
1996	102.4%	94.9%	121.6%
1997	103.7%	96.0%	117.5%
1998	101.9%	96.6%	115.8%
1999	100.0%	95.7%	115.1%
2000	99.1%	94.5%	115.7%
2001	98.4%	95.8%	116.5%
2002	97.9%	96.1%	119.0%
2003	95.3%	92.3%	122.3%
2004	91.9%	89.9%	128.9%
2005	92.3%	87.1%	129.4%
2006	91.3%	85.8%	130.3%
2007	90.6%	87.9%	132.2%
2008	90.9%	88.7%	128.3%
2009	90.1%	89.0%	134.1%
2010	92.4%	92.8%	133.5%

Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

<sup>(1)</sup> Includes Medicaid Disproportionate Share payments.

Data for Chart 4.6

Table 4.5: Hospital Payment Shortfall Relative to Costs for Medicare, Medicaid, and Other Government, 1997 – 2010<sup>(1)</sup>

Year	Medicare (billions)	Medicaid (billions)	Other Government (billions)
1997	\$4.3	-\$1.6	-\$0.7
1998	\$2.3	-\$1.4	-\$0.6
1999	-\$0.1	-\$1.8	-\$0.4
2000	-\$1.3	-\$2.5	-\$0.4
2001	-\$2.3	-\$2.0	-\$0.6
2002	-\$3.3	-\$2.3	-\$0.6
2003	-\$8.1	-\$4.9	-\$0.5
2004	-\$15.0	-\$7.1	-\$0.5
2005	-\$15.5	-\$9.8	-\$0.4
2006	-\$18.6	-\$11.3	\$1.1
2007	-\$21.5	-\$10.4	\$1.4
2008	-\$21.9	-\$10.5	\$1.2
2009	-\$25.2	-\$11.3	\$0.4
2010	-\$20.1	-\$7.8	\$0.4

Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

<sup>(1)</sup> Costs reflect a cap of 1.0 on the cost-to-charge ratio.

Data for Chart 4.7



# APPENDIX 5

Supplementary Data Tables  
Workforce

Table 5.1: Total Number of Active Physicians<sup>(1)</sup> per 1,000 Persons by State, 2008 and 2009

State	Physicians per 1,000 Persons		State	Physicians per 1,000 Persons	
	08	09		08	09
Alabama	2.16	2.15	Montana	2.30	2.30
Alaska	2.42	2.42	Nebraska	2.47	2.49
Arizona	2.23	2.26	Nevada	1.97	1.98
Arkansas	2.04	2.04	New Hampshire	2.86	2.93
California	2.62	2.64	New Jersey	3.29	3.30
Colorado	2.66	2.68	New Mexico	2.39	2.39
Connecticut	3.66	3.68	New York	3.78	3.79
Delaware	2.64	2.62	North Carolina	2.50	2.50
District of Columbia	7.49	7.38	North Dakota	2.47	2.52
Florida	2.58	2.60	Ohio	2.82	2.85
Georgia	2.14	2.13	Oklahoma	2.09	2.13
Hawaii	3.18	3.18	Oregon	2.78	2.80
Idaho	1.79	1.84	Pennsylvania	3.31	3.31
Illinois	2.78	2.80	Rhode Island	3.70	3.72
Indiana	2.22	2.23	South Carolina	2.28	2.28
Iowa	2.15	2.16	South Dakota	2.28	2.32
Kansas	2.38	2.41	Tennessee	2.60	2.62
Kentucky	2.31	2.33	Texas	2.15	2.16
Louisiana	2.53	2.54	Utah	2.08	2.10
Maine	3.11	3.16	Vermont	3.60	3.59
Maryland	4.02	4.01	Virginia	2.72	2.75
Massachusetts	4.36	4.34	Washington	2.70	2.70
Michigan	2.85	2.92	West Virginia	2.57	2.61
Minnesota	2.88	2.89	Wisconsin	2.62	2.65
Mississippi	1.82	1.82	Wyoming	1.99	1.99
Missouri	2.62	2.61			

Source: National Center for Health Statistics. (2012). *Health, United States, 2011*. Hyattsville, MD.

<sup>(1)</sup> Includes active federal and non-federal doctors of medicine and active doctors of osteopathy.

Data for Chart 5.2



Table 5.2: Medical and Dental Residents in Training in Community Hospitals, 1990 – 2010

Year	Residents
1990	64,530
1991	67,189
1992	69,111
1993	73,377
1994	74,027
1995	78,137
1996	77,160
1997	75,398
1998	78,345
1999	77,796
2000	77,411
2001	77,731
2002	78,715
2003	77,813
2004	84,628
2005	83,823
2006	85,320
2007	92,311
2008	90,543
2009	94,729
2010	95,270

Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

Data for Chart 5.3

Table 5.3: Total Full-time Equivalent Employees Working in Hospitals and Full-time Equivalents per Adjusted Admission,<sup>(1)</sup> 1990 – 2010

Year	FTE Personnel	FTE per Adjusted Admission
1990	3,415,622	0.083
1991	3,530,623	0.084
1992	3,615,145	0.084
1993	3,674,250	0.085
1994	3,690,905	0.083
1995	3,707,958	0.081
1996	3,724,843	0.079
1997	3,789,752	0.078
1998	3,831,068	0.077
1999	3,837,964	0.075
2000	3,911,412	0.073
2001	3,987,274	0.073
2002	4,069,495	0.072
2003	4,108,628	0.071
2004	4,147,941	0.070
2005	4,256,899	0.070
2006	4,343,480	0.071
2007	4,465,028	0.072
2008	4,549,560	0.071
2009	4,584,624	0.070
2010	4,599,752	0.070

Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

<sup>(1)</sup> An aggregate measure of workload reflecting the number of inpatient admissions, plus an estimate of the volume of outpatient services, expressed in units equivalent to an inpatient admission in terms of level of effort.

Data for Charts 5.4 and 5.5

Table 5.4: Number of RN Full-time Equivalent Employees, RN Full-time Equivalent Employees per Adjusted Admission, and RN Full-time Equivalents as a Percentage of Total FTEs, 1990 – 2010

Year	RN FTEs (thousands)	RN FTEs per Adjusted Admission	RN FTEs as a Percent of Total FTEs
1990	809.9	0.0197	23.7%
1991	840.5	0.0200	23.8%
1992	858.9	0.0201	23.8%
1993	874.1	0.0201	23.8%
1994	890.9	0.0201	24.1%
1995	893.7	0.0195	24.1%
1996	895.1	0.0190	24.0%
1997	901.2	0.0185	23.8%
1998	929.7	0.0186	24.3%
1999	938.1	0.0182	24.4%
2000	957.6	0.0179	24.5%
2001	958.0	0.0174	24.0%
2002	988.1	0.0174	24.3%
2003	1,021.3	0.0177	24.9%
2004	1,053.1	0.0179	25.4%
2005	1,094.2	0.0181	25.7%
2006	1,138.6	0.0185	26.2%
2007	1,191.2	0.0192	26.7%
2008	1,228.4	0.0192	27.0%
2009	1,268.7	0.0194	27.7%
2010	1,293.9	0.0197	28.1%

Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

Data for Charts 5.6 and 5.7

Table 5.5: Number of Physicians<sup>(1)</sup> by Age, 1980, 1990, 2000, and 2010

Age Group	1980	1990	2000	2010
Under 35	128,506	134,872	136,704	165,544
35-44	118,840	184,743	211,873	214,468
45-54	88,063	116,803	201,646	220,858
55-64	68,239	83,614	118,608	189,648
65 & Over	64,031	95,389	144,939	194,857
<b>Total # of Physicians</b>	<b>467,679</b>	<b>615,421</b>	<b>813,770</b>	<b>985,375</b>

Source: American Medical Association. (2012 Edition). *Physician Characteristics and Distribution in the US*.

<sup>(1)</sup> Includes inactive physicians and residents.

Data for Chart 5.8

Table 5.6: RN Employment by Type of Provider, 1980 – 2008<sup>(1)</sup>

	1980	1984	1988	1992	1996	2000	2004	2008
<b>Percent Employed by Hospitals</b>	65.9%	68.2%	68.0%	66.7%	60.1%	59.3%	57.4%	62.2%
<b>Percent Employed by Nursing Homes/ Extended Care Facilities</b>	3.8%	2.7%	1.8%	2.0%	2.3%	2.1%	2.7%	3.8%
<b>Percent Employed by Public/Community Health</b>	12.5%	11.3%	11.1%	13.5%	17.2%	18.3%	15.2%	14.2%
<b>All Other</b>	17.8%	17.8%	19.0%	17.8%	20.5%	20.2%	24.8%	19.7%

Source: Source: Bureau of Health Professions, Health Resources and Services Administration. (2010). *Findings from the 2008 National Sample Survey of Registered Nurses*. Link: <http://bhpr.hrsa.gov/healthworkforce/msurvey/2008/nssrn2008.pdf>.

<sup>(1)</sup> Total percent by setting may not equal the estimated total of all registered nurses due to incomplete information provided by respondents and the effect of rounding.

Data for Chart 5.9

Table 5.7: Distribution of RN Workforce by Age Group, 1980 – 2008

Age Group	1980	1990	2000	2004	2008
20s	321,316	252,890	247,123	233,437	288,184
30s	320,101	536,442	614,728	532,707	613,971
40s	224,468	419,766	935,866	916,956	791,932
50s	171,240	206,647	585,497	801,643	892,952
60s	36,716	46,372	313,675	395,450	389,796
Total # of RNs	1,073,841	1,462,117	2,696,890	2,880,193	2,976,835

Source: Bureau of Health Professions, Health Resources and Services Administration. (1980-2004). *Findings from the National Survey of Registered Nurses*. Link: <http://bhpr.hrsa.gov/healthworkforce/rnsurvey04/2.htm#age>. Bureau of Health Professions, Health Resources and Services Administration. (2010). *Findings from the 2008 National Sample Survey of Registered Nurses*. Link: <http://bhpr.hrsa.gov/healthworkforce/rnsurvey/2008/nssrn2008.pdf>.

Data for Chart 5.10

Table 5.8: National Supply and Demand Projections for FTE RNs, 2018 – 2025

Year	RN FTE Supply	RN FTE Demand
2018	2,703,969	2,719,954
2019	2,716,771	2,771,930
2020	2,727,231	2,824,900
2021	2,737,616	2,874,900
2022	2,750,080	2,924,900
2023	2,771,303	2,974,900
2024	2,790,241	3,024,900
2025	2,816,303	3,074,900

Source: Copyrighted and published by Project HOPE/*Health Affairs* as Buerhaus PI, Auerbach DI, Staiger DO. The Recent Surge In Nurse Employment: Causes and Implications. *Health Affairs*, 2009; 28(4):w657-68. The published article is archived and available online at [www.healthaffairs.org](http://www.healthaffairs.org).

Data for Chart 5.12



# APPENDIX 6

Supplementary Data Tables  
The Economic Contribution  
of Hospitals

Table 6.1: Number of Full-time and Part-time Hospital Employees, 1993 – 2010

Year	Employees (thousands)
1993	4,315.7
1994	4,347.8
1995	4,384.8
1996	4,397.9
1997	4,495.5
1998	4,536.4
1999	4,544.4
2000	4,652.9
2001	4,713.4
2002	4,818.1
2003	4,876.7
2004	4,922.9
2005	5,047.1
2006	5,152.1
2007	5,287.5
2008	5,379.9
2009	5,405.6
2010	5,416.7

Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

Data for Chart 6.2



# APPENDIX 7

Supplementary Data Tables  
Community Health Indicators

Table 7.1: U.S. Population Trends and Projections<sup>(1)</sup> by Age, 1980 – 2050

Year	Population 0-19 Years (thousands)	Population 20-64 Years (thousands)	Population 65-84 Years (thousands)	Population 85+ Years (thousands)
1980	72,416	128,631	23,306	2,193
1990	71,322	146,146	28,162	3,080
2000	80,549	166,515	30,794	4,267
2010	84,151	185,854	34,478	5,751
2015	86,650	192,053	40,544	6,293
2020	90,703	195,881	48,208	6,597
2025	94,254	199,290	56,669	7,239
2030	97,683	203,730	63,348	8,746
2035	101,010	210,978	66,093	11,450
2040	104,616	219,800	67,041	14,198
2045	108,631	228,971	67,471	16,986
2050	112,940	237,521	69,506	19,042

Source: U.S. Department of Commerce, Bureau of the Census. *Projections of the Population by Age and Sex for the United States: 2010-2050*.

(1) Years 2010 through 2050 are projections.

Data for Chart 7.1

Table 7.2: U.S. Population Trends and Projections<sup>(1)</sup> by Race,<sup>(2)</sup> 2010 – 2050

Year	White, Non-Hispanic (thousands)	Black (thousands)	White, Hispanic (thousands)	Asian (thousands)	All Other <sup>(3)</sup> (thousands)
2010	200,853	39,909	48,969	14,415	9,279
2015	203,208	42,137	56,795	16,527	10,569
2020	205,255	44,389	65,265	18,756	11,967
2025	206,662	46,594	74,460	21,109	13,467
2030	207,217	48,728	84,377	23,586	15,081
2035	206,958	50,810	94,947	26,169	16,823
2040	206,065	52,868	106,092	28,836	18,704
2045	204,772	54,911	117,763	31,577	20,719
2050	203,347	56,944	129,951	34,399	22,867

Source: U.S. Department of Commerce, Bureau of the Census. *Projections of the Population by Sex, Race, and Hispanic Origin for the United States: 2010-2050*

(1) Years 2010 through 2050 are projections.

(2) Black, Asian, and All Other categories include individuals of Hispanic and non-Hispanic origin.

(3) All Other includes American Indian, Native Alaskan, Native Hawaiian, other Pacific Islander, and two or more races.

Data for Chart 7.2

Table 7.3: Age-adjusted Death Rates, Selected Causes, by Race, 2008

Cause of Death	All Persons (per 100,000)	White <sup>(1)</sup> (per 100,000)	Black <sup>(1)</sup> (per 100,000)
Diseases of the Heart	186.5	183.9	238.6
Malignant Neoplasms	175.3	174.7	209.1
Cerebrovascular Disease	40.7	39.1	57.4
Chronic Lower Respiratory Diseases	44.0	46.4	30.4
Diabetes	21.8	19.9	40.5
Influenza and Pneumonia	16.9	16.7	18.9
HIV Infection	3.3	1.7	15.3

Source: National Center for Health Statistics. (2012). *Health, United States, 2011*. Hyattsville, MD.

<sup>(1)</sup> Racial categories include individuals of both Hispanic and non-Hispanic origin.

Data for Chart 7.3

Table 7.4: Number of Persons with Asthma, 1980 – 2010

Year	Total (millions)
1980	6.98
1990	10.31
2001	31.35
2005	32.62
2006	34.13
2007	34.01
2008	38.43
2009	39.93
2010	39.19

Source: Centers for Disease Control and Prevention (2002). "Asthma Surveillance – United States, 1980-1999." National Center for Health Statistics. National Health Interview Survey 2001, 2005, 2006, 2007, 2008, 2009, and 2010.

Data for Chart 7.6

Table 7.5: Percent of Adults Who Are Overweight<sup>(1)</sup> and Obese, 1960 – 2010

Years	Overweight <sup>(2)</sup>	Obese
1960-1962	44.8%	13.3%
1976-1980	47.4%	15.1%
1988-1994	56.0%	23.3%
1999-2002	65.2%	31.1%
2003-2006	66.9%	34.1%
2007-2010	68.5%	35.3%

Source: National Center for Health Statistics. (2012). *Health, United States, 2011*. Hyattsville, MD.

<sup>(1)</sup> Data are adjusted to 2000 standard population.

<sup>(2)</sup> Overweight includes obese.

Data for Chart 7.8

Table 7.6: Percent Uninsured by Race,<sup>(1)(2)</sup> 1984 – 2010

Year	All	White	Black	Asian	Hispanic
1984	14.5%	11.9%	19.7%	18.5%	29.5%
1989	15.6%	12.1%	21.5%	16.9%	33.7%
1995	16.1%	13.0%	17.9%	18.6%	31.4%
2000	17.0%	12.5%	19.5%	17.6%	35.6%
2008	16.8%	12.5%	17.9%	13.9%	33.3%
2009	17.5%	13.2%	18.8%	16.2%	32.9%
2010	18.2%	13.7%	20.7%	17.1%	32.0%

Source: National Center for Health Statistics. (2012). *Health, United States, 2011*. Hyattsville, MD.

<sup>(1)</sup> White and Black categories include individuals of non-Hispanic origin only. Asian category includes individuals of Hispanic and non-Hispanic origin.

<sup>(2)</sup> Data for population under age 65.

Data for Chart 7.13

Table 7.7: Percent of Persons with No Usual Source of Care by Race,<sup>(1)</sup> 1993 – 2010

Year	White	Black	Asian	Hispanic
<b>Adults, Ages 18 – 64</b>				
1993-1994	17.1	19.7	24.8	30.3
1995-1996	15.0	18.1	21.5	27.4
1997-1998	15.4	19.3	21.7	30.4
1999-2000	14.9	19.2	22.1	32.6
2001-2002	13.1	16.8	20.1	32.5
2003-2004	14.0	18.1	19.3	32.9
2005-2006	14.8	19.2	17.9	35.1
2006-2007	15.2	18.9	17.3	34.3
2008-2009	16.0	21.4	19.4	32.8
2009-2010	16.8	22.2	20.8	33.3
<b>Children Under 18 Years</b>				
1993-1994	5.7	10.2	9.7	14.3
1995-1996	4.6	7.5	8.4	13.2
1997-1998	4.5	8.8	10.7	13.2
1999-2000	4.7	7.6	10.0	14.2
2001-2002	3.4	6.6	11.2	13.5
2003-2004	3.2	6.2	7.7	11.4
2005-2006	3.3	5.4	7.7	11.5
2006-2007	4.0	4.9	7.1	11.3
2008-2009	4.1	5.7	5.1	9.4
2009-2010	3.8	5.4	6.1	9.5

Source: National Center for Health Statistics. (2012). *Health, United States, 2011*. Hyattsville, MD.

<sup>(1)</sup> White and Black categories include individuals of non-Hispanic origin only. Asian category includes individuals of Hispanic and non-Hispanic origin.

Data for Charts 7.14, 7.16

Table 6.2: Hospital Employment vs. Employment in Other Industries, 2011<sup>(1)</sup>

Title	Employment (thousands)
Full-service Restaurants	4,596.3
General Medical & Surgical Hospitals	4,375.5
Limited-service Eating Places	3,511.4
Employment Services	2,951.6
Grocery Stores	2,476.7
Offices of Physicians	2,355.3
Building Equipment Contractors	1,643.5
Department Stores	1,546.7

Source: Department of Labor, Bureau of Labor Statistics, Current Employment Statistics (CES) Survey, customized tables. Data released 2012. Link: <http://www.bls.gov/ces>.

<sup>(1)</sup> 2011 figures reflect projections.

Data for Chart 6.4

Table 6.3: Average Weekly Earnings of Workers, Hospitals<sup>(1)</sup> vs. All Service-providing Industries, 1990 – 2010

Year	Hospitals	All Service-providing Industries
1990	\$399.45	\$315.49
1991	\$423.51	\$325.31
1992	\$443.18	\$335.46
1993	\$460.29	\$345.03
1994	\$473.34	\$354.97
1995	\$488.68	\$364.14
1996	\$499.54	\$376.72
1997	\$518.48	\$394.77
1998	\$535.47	\$412.78
1999	\$547.33	\$427.30
2000	\$569.90	\$445.00
2001	\$608.41	\$460.32
2002	\$638.23	\$473.10
2003	\$674.34	\$483.89
2004	\$715.12	\$493.67
2005	\$762.07	\$509.58
2006	\$794.24	\$532.84
2007	\$876.80	\$689.95
2008	\$920.70	\$709.65
2009	\$946.11	\$719.10
2010	\$980.15	\$734.84

Source: Department of Labor, Bureau of Labor Statistics, Current Employment Statistics (CES) Survey, customized tables. Data released 2012. Link: <http://www.bls.gov/ces>.

<sup>(1)</sup> Includes physicians employed by hospitals.

Data for Chart 6.5