

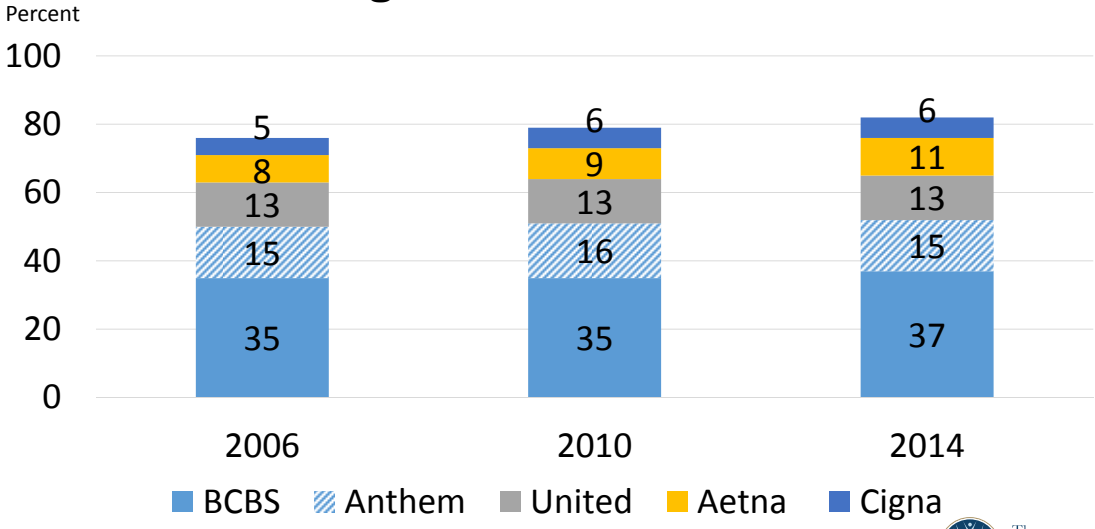
# Health Care Consolidation: Trends, Impact, and Regulation

Eric Schneider, M.D., F.A.C.P.  
Senior Vice President for Policy and Research  
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Contact Information:  
Email: [ES@cmwf.org](mailto:ES@cmwf.org)  
Phone: 212-606-3864  
Twitter Handle: @ericsschneidermd



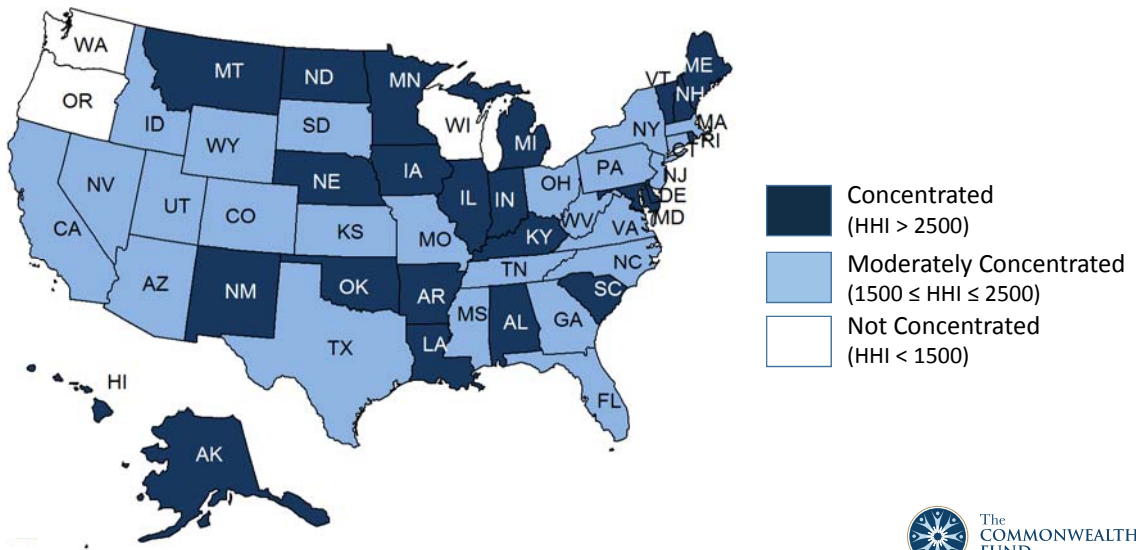
## Estimated National Market Shares Four Largest Insurers, 2002-2014



Source: Dafny, L. Senate Testimony. 2015



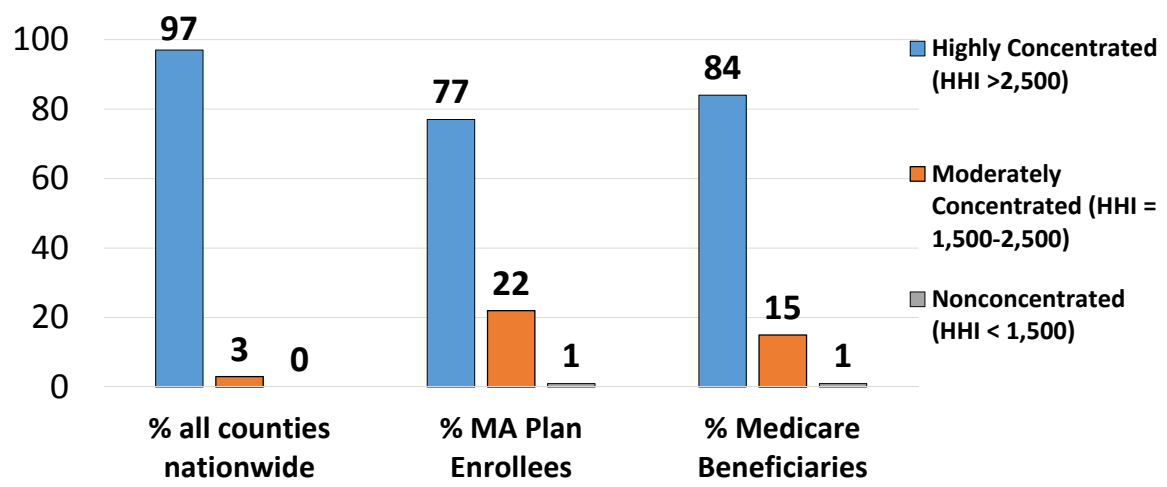
# Insurance Market Concentration 2014



Source: Analysis of HealthLeaders Interstudy Data 2007-2014

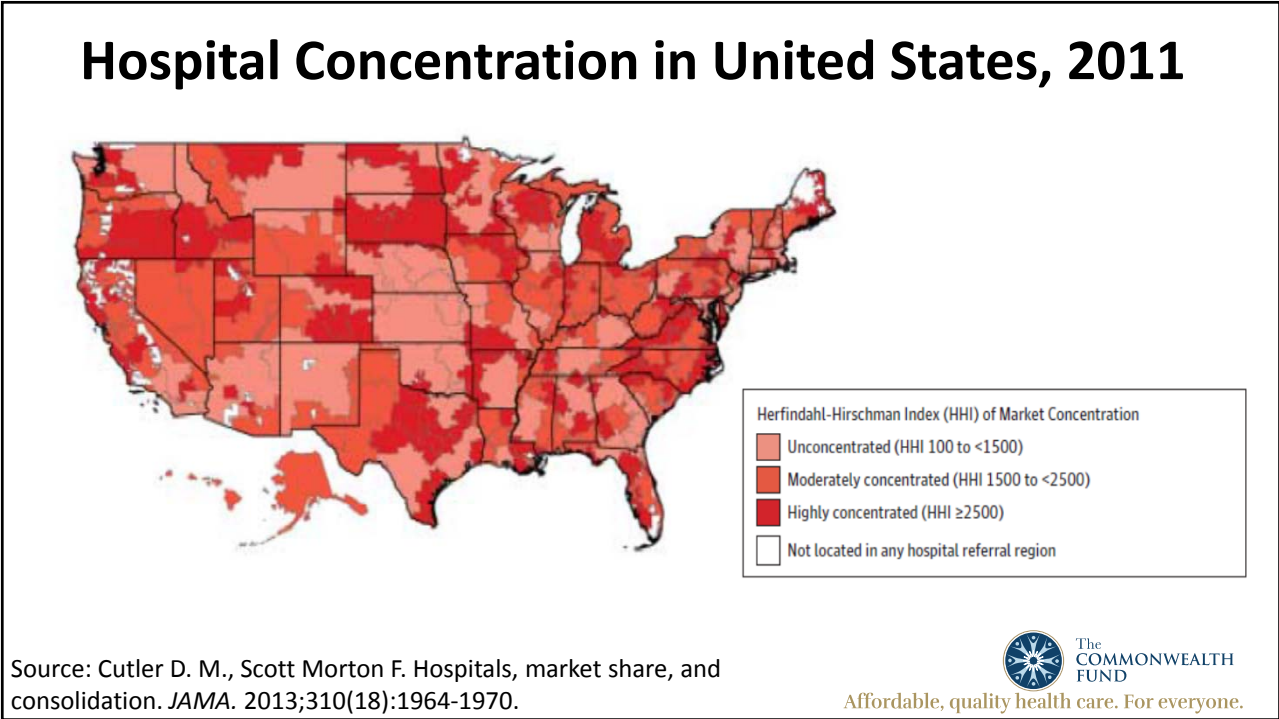
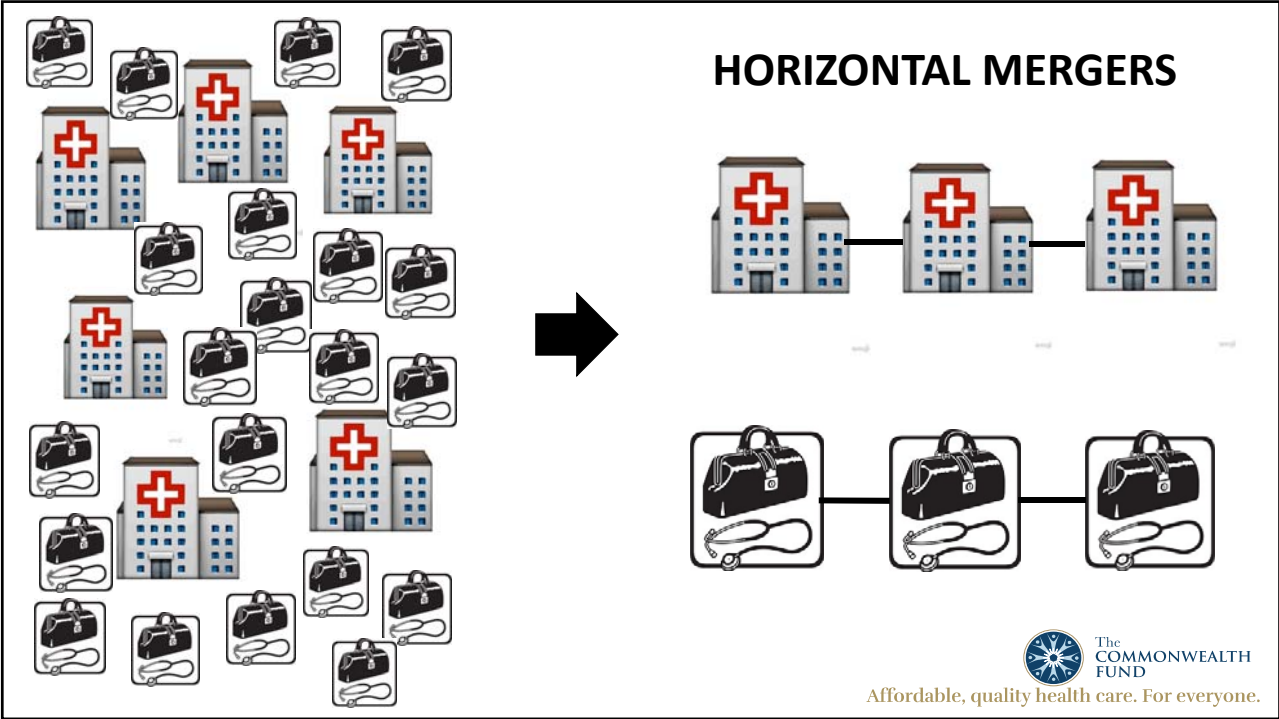


# Market Concentration Medicare Advantage Plans, 2012

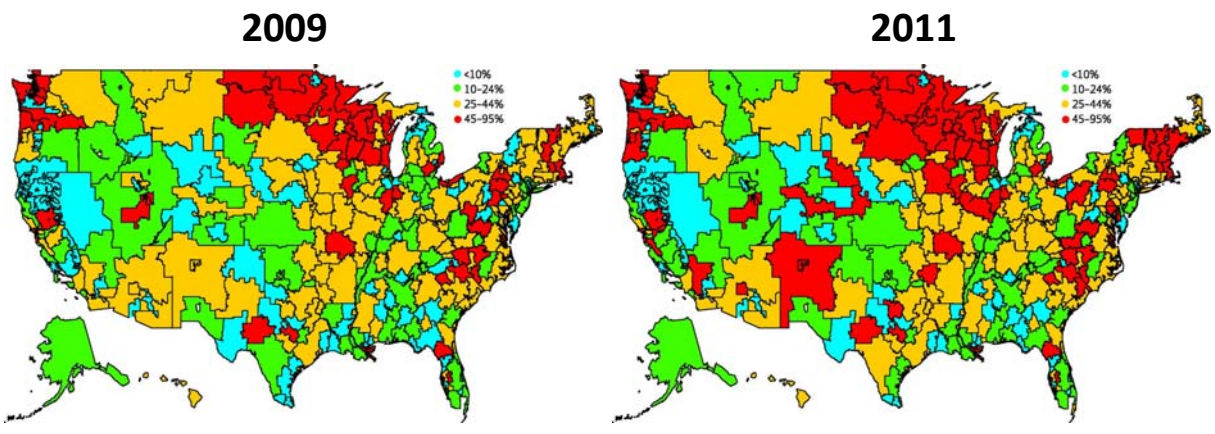


Source: Biles B., Casillas G., Guterman S. Competition Among Medicare's Private Health Plans: Does It Really Exist? *Issue Brief (Commonw Fund)*. 2015;25:1-14.





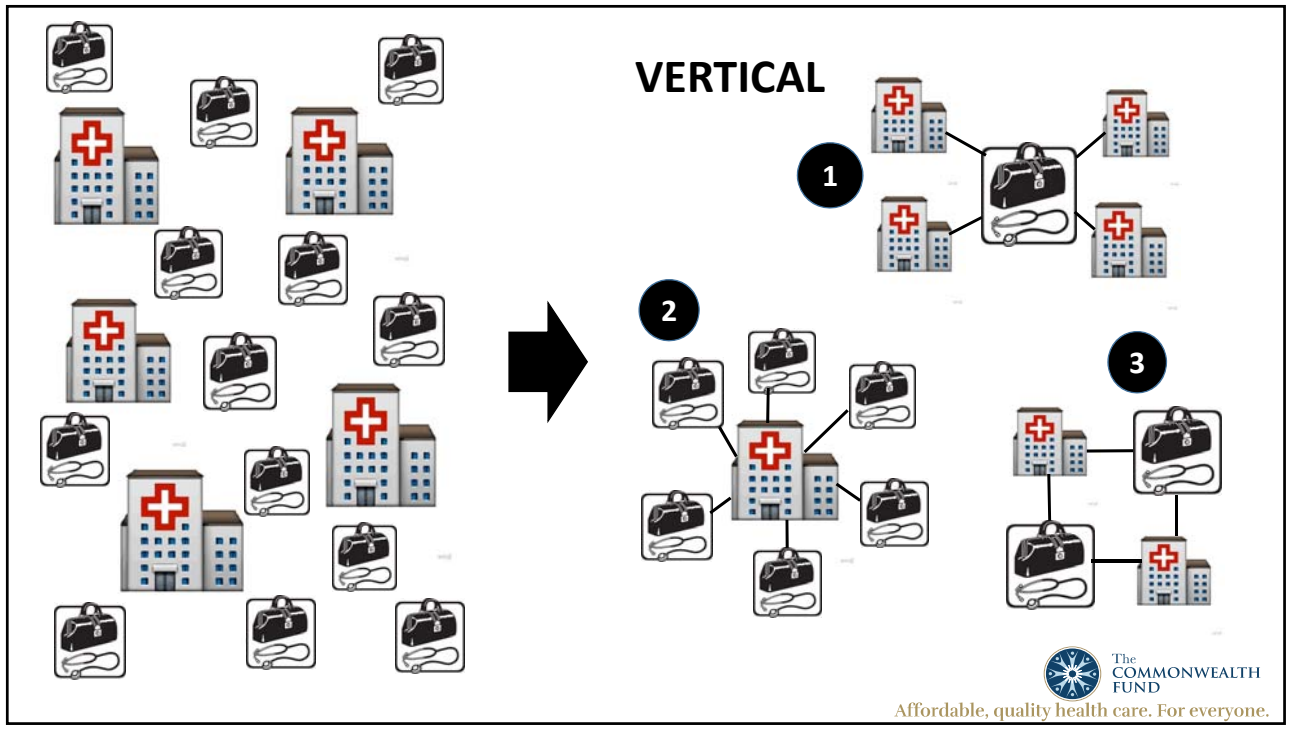
# Physicians in Large Practices (>50 Physicians) 2009 and 2011



Source: W. Pete Welch et al. Health Aff 2013;32:1659-1666

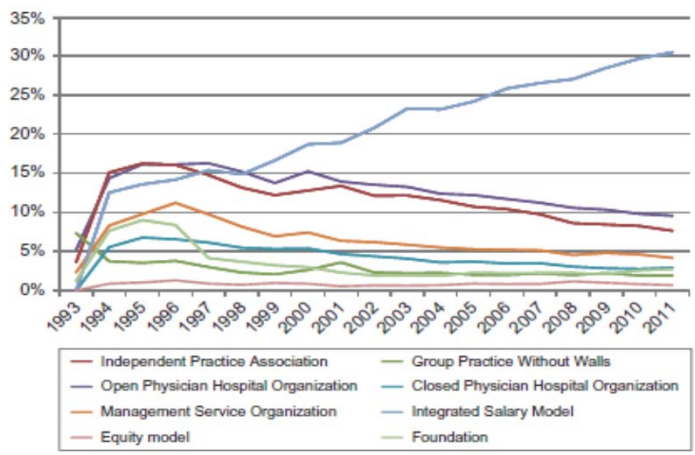


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### Physician-Hospital Arrangements 1993-2011

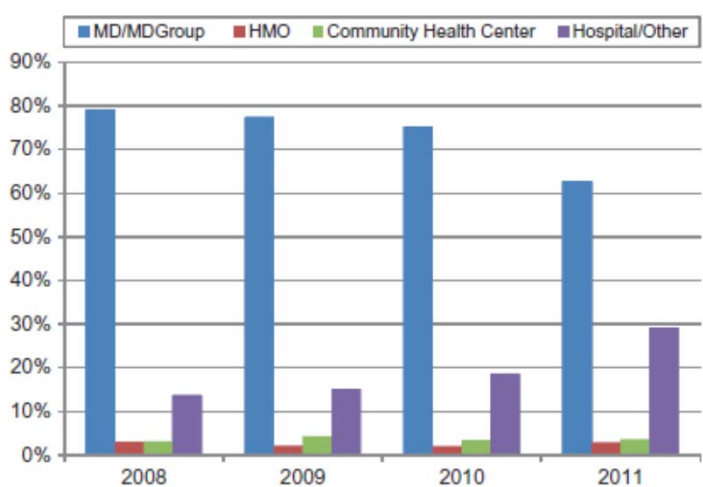


Source: Burns L. R., Goldsmith J. C., Sen A. Horizontal and vertical integration of physicians: a tale of two tails. *Adv Health Care Manag.* 2013;15:39-117.



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### Ownership of Office-Based Physician Practices 2008-2011



Source: Burns L. R., Goldsmith J. C., Sen A. Horizontal and vertical integration of physicians: a tale of two tails. *Adv Health Care Manag.* 2013;15:39-117.



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## Questions for today...

- When insurers merge what happens to premiums?
- When providers consolidate what happens to prices?
- Can provider integration improve quality and reduce costs?
- If insurers gain market share can they counteract provider price increases? Can they improve the quality of care?
- What can policymakers do to promote quality and affordability as providers consolidate and integrate?



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