Health Care Consolidation: Trends, Impact, and Regulation

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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

Hospital Concentration in United States, 2011

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

Source: W. Pete Welch et al. Health Aff 2013;32:1659-1666
Physician-Hospital Arrangements
1993-2011


Ownership of Office-Based Physician Practices
2008-2011

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?