



St. Louis Health Care Industry Overview

By the St. Louis Area Business Health Coalition

2017 Individual Hospital and System Results

System Name (market share ¹)	Avail. beds	Patient days	Avail. occup. %	Avg. LOS	FTE per occup. bed	Net profit	Profit margin	Profit margin net of deprec.
<u>BJC HealthCare (36%)</u>								
Alton Memorial	152	26,268	47.2%	3.4	3.7	-9,332,160	-6.91%	1.96%
Barnes-Jewish Hospital	1,303	321,430	67.4%	6.1	5.4	69,608,504	3.53%	9.20%
Barnes-Jewish - St. Peters	113	20,958	50.7%	4.2	3.2	3,833,906	3.20%	12.53%
Barnes-Jewish W. County	77	6,159	21.9%	2.3	4.5	12,372,254	10.05%	18.24%
Christian Hospital	460	64,309	38.2%	5.3	4.3	-45,587,345	-17.58%	-7.47%
Memorial Hospital	222	51,699	63.6%	4.4	4.9	-9,251,099	-4.01%	1.04%
Memorial Hospital East	94	16,695	77.2%	3.5	3.3	-28,191,756	-41.91%	-25.21%
Missouri Baptist Hospital - Sullivan	35	7,955	62.1%	4.0	2.1	1,319,508	2.27%	9.03%
Missouri Baptist Med. Ctr.	426	90,225	57.9%	4.4	3.9	18,184,609	2.95%	9.00%
Progress West Hospital	72	10,053	38.1%	3.1	5.1	-4,749,783	-7.09%	1.92%
St. Louis Children's Hospital	274	73,665	73.5%	7.1	7.8	62,400,574	9.78%	14.69%
Network Total	3,228	689,416	59.0%	5.2	5.0	70,607,212	1.65%	8.01%
<u>SSM Health (26%)</u>								
Cardinal Glennon Children's Hospital	191	49,192	70.4%	7.0	6.4	15,871,006	4.71%	8.68%
DePaul Health Center	455	111,218	66.8%	4.9	3.4	43,453,035	10.09%	12.81%
St. Clare Health Center	180	43,035	65.3%	4.6	3.7	7,773,096	4.12%	8.18%
St. Joseph Health Center ²	406	72,114	48.5%	5.2	3.0	6,062,986	2.47%	6.47%
St. Joseph Hospital-West	199	36,990	50.8%	4.0	3.5	10,959,092	6.52%	10.83%
Saint Louis University Hospital	291	98,139	92.1%	6.0	3.8	-32,471,415	-6.65%	-1.17%
St. Mary's Health	420	95,975	62.4%	5.4	3.4	9,356,448	2.54%	6.04%
Network Total	2,142	506,663	64.6%	5.3	3.8	61,004,248	2.74%	6.76%
<u>Mercy (22%)</u>								
Mercy Hospital Jefferson	251	44,036	47.9%	4.7	3.5	12,555,215	7.97%	13.45%
Mercy Hospital Lincoln	25	3,192	34.9%	5.2	4.2	1,111,636	3.38%	4.55%
Mercy Hospital St. Louis	859	202,286	64.3%	5.0	4.0	180,326,063	16.34%	20.21%
Mercy Hospital South ³	767	113,250	40.3%	4.4	4.7	-27,076,000	-6.10%	-1.33%
Mercy Hospital Washington	148	17,874	33.0%	3.1	4.4	23,533,465	12.73%	16.78%
Network Total	2,050	380,638	50.7%	4.7	4.1	190,450,379	9.90%	14.08%
<u>St. Luke's Hospital (5%)</u>								
St. Luke's Des Peres Hospital ⁴	88	13,968	43.4%	3.1	5.4	-3,068,969	-3.05%	0.57%
St. Luke's Hospital	402	59,453	40.4%	4.2	5.1	29,246,000	5.63%	10.31%
Network Total	490	73,421	40.9%	4.0	5.6	26,177,031	4.22%	8.73%
<u>Hospital Sisters Health System (3%)</u>								
HSBS Holy Family Hospital ⁵	42	2,378	15.5%	4.3	5.6	1,870,882	10.86%	15.29%
St. Elizabeth's Hospital	224	33,473	40.8%	4.2	4.5	-30,812,000	-19.89%	-9.58%
St. Joseph Hospital (Breese, IL)	49	3,595	20.0%	2.9	4.6	16,090,614	23.98%	28.30%
St. Joseph Hospital (Highland, IL)	25	6,609	72.2%	6.5	3.4	3,017,368	7.07%	13.39%
Network Total	340	46,055	37.0%	4.3	5.0	-9,833,136	-3.49%	4.43%
<u>Missouri Non-Merged (1%)</u>								
Kindred Hospital (Kindred Healthcare)	92	20,213	60.0%	26.5	3.3	-1,981,532	-6.37%	-4.30%
St. Alexius Hospital (Success Healthcare)	178	35,991	55.2%	10.3	3.4	-3,495,140	-6.16%	-4.33%
Total	270	56,204	56.9%	10.3⁶	3.7	-5,476,672	-6.23%	-4.32%
<u>Illinois Non-Merged (7%)</u>								
Anderson Hospital	154	29,209	51.8%	3.2	3.6	20,743,265	11.04%	15.83%
Carlinville Area Hospital	25	3,289	35.9%	6.3	2.6	-87,653	-0.36%	10.82%
Community Memorial Hospital	25	1,379	15.1%	5.1	2.0	-685,109	-4.09%	3.05%
Gateway Regional Med. Ctr. (Quorum Health)	319	35,756	30.6%	5.0	3.1	3,413,720	2.96%	8.74%
Jersey Community Hospital	46	3,081	18.3%	3.4	3.1	759,285	1.81%	5.75%
OSF Saint Anthony's Health Ctr.	113	11,595	28.0%	3.4	4.4	-5,005,833	-6.68%	-1.18%
Touchette Regional Hospital	124	8,810	19.4%	3.6	5.2	-159,039	-0.28%	3.54%
Total	806	93,119	31.6%	3.9	4.3	18,978,636	3.67%	8.99%
Aggregate for 38 St. Louis Hospitals	9,326	1,845,516	54.3%	5.0⁶	4.2⁷	351,907,698	3.54%	8.79%

¹ Market share percentages for each network are based on total number of discharges for the hospitals in the network. Hospital network configurations are current as of 2018.

² St. Joseph Health Center & St. Joseph Hospital-Wentzville report on a combined basis.

³ Mercy finalized acquisition of St. Anthony's Medical Center in June 2017.

⁴ St. Luke's Hospital acquired Des Peres Hospital in May 2018.

⁵ HSBS Holy Family Hospital reported only 6 months of data for 2017.

⁶ Kindred Hospital, a long-term acute care hospital, is not included in the aggregate average LOS figure.

⁷ St. Louis average excludes two teaching hospitals, Barnes-Jewish Hospital and St. Louis University Hospital, that may have higher numbers of FTEs.



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Profit Margin Trends

St. Louis Area Hospital Industry, 2008 - 2017

Missouri Hospitals	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Barnes-Jewish Hospital	-32.40%	17.78%	14.30%	7.02%	4.43%	3.90%	4.76%	3.77%	3.45%	3.53%
Barnes-Jewish - St. Peters	-8.39%	17.26%	14.99%	7.67%	4.80%	3.65%	7.80%	4.59%	6.10%	3.20%
Barnes-Jewish W. County	4.46%	3.71%	7.93%	8.37%	11.55%	10.88%	12.01%	10.31%	10.88%	10.05%
Cardinal Glennon Children's Hospital	9.98%	13.79%	9.85%	5.26%	11.91%	12.63%	11.89%	12.25%	12.71%	4.71%
Christian Hospital	-7.93%	11.04%	5.13%	-2.32%	-7.11%	-13.47%	-23.35%	-4.81%	-7.70%	-17.58%
DePaul Health Center	0.15%	1.21%	2.66%	4.44%	7.83%	6.39%	11.35%	10.78%	11.41%	10.09%
Kindred Hospital	13.94%	3.18%	-5.14%	0.48%	0.20%	2.06%	4.90%	8.65%	1.76%	-6.37%
Mercy Hospital Jefferson	4.71%	7.16%	4.62%	1.48%	2.68%	8.81%	2.82%	5.38%	7.57%	7.97%
Mercy Hospital Lincoln ¹	7.31%	-0.73%	-2.92%	0.75%	-1.28%	-2.42%	-4.91%	-22.33%	-4.21%	3.38%
Mercy Hospital St. Louis	10.60%	8.19%	7.26%	6.63%	8.88%	9.79%	10.80%	13.66%	17.42%	16.34%
Mercy Hospital South ²	4.08%	0.18%	-0.71%	3.42%	-5.60%	4.21%	3.31%	0.30%	-3.33%	-6.10%
Mercy Hospital Washington	5.61%	0.35%	-5.86%	-6.19%	-4.96%	10.33%	13.69%	18.28%	16.05%	12.73%
Missouri Baptist Hospital - Sullivan	-14.17%	-4.89%	-4.74%	-3.25%	-1.72%	-11.50%	-4.45%	-2.15%	0.69%	2.27%
Missouri Baptist Med. Ctr.	-3.20%	14.74%	13.93%	8.43%	5.16%	4.50%	4.67%	2.93%	4.35%	2.95%
Progress West Hospital	-54.00%	-18.10%	-18.44%	-17.10%	-9.22%	-5.87%	-8.52%	-2.81%	-1.72%	-7.09%
St. Alexius Hospital ³	1.38%	2.60%	-1.85%	-7.81%	0.69%	1.45%	9.59%	-5.02%	-7.36%	-6.16%
St. Clare Health Center	n/a	-30.12%	-1.29%	0.11%	1.59%	-6.63%	-3.64%	0.40%	2.71%	4.12%
St. Joseph Health Center ⁴	-3.95%	4.83%	1.46%	4.26%	1.87%	-3.00%	3.25%	4.53%	3.48%	2.47%
St. Joseph Hospital-West	-1.49%	1.76%	5.64%	7.30%	8.49%	8.94%	15.01%	13.57%	11.28%	6.52%
St. Louis Children's Hospital	-10.48%	19.00%	15.33%	8.12%	8.44%	9.26%	6.08%	9.12%	9.85%	9.78%
Saint Louis University Hospital	1.78%	-1.80%	1.75%	-2.63%	-16.06%	-5.49%	-9.09%	-4.59%	5.03%	-6.65%
St. Luke's Des Peres Hospital ⁵	7.14%	9.47%	7.66%	5.59%	0.14%	9.32%	5.43%	4.12%	-1.60%	-3.05%
St. Luke's Hospital	6.34%	4.25%	4.34%	4.96%	2.35%	4.20%	4.99%	5.55%	3.67%	5.63%
St. Mary's Health Center	1.15%	8.45%	9.11%	6.30%	5.68%	4.03%	7.34%	7.26%	4.22%	2.54%
Aggregate for Missouri Hospitals	-4.20%	9.20%	7.91%	4.74%	3.27%	4.33%	4.77%	5.79%	6.31%	4.47%
Illinois Hospitals										
Alton Memorial Hospital	1.58%	22.48%	16.86%	-1.97%	-5.14%	-6.79%	-2.24%	5.15%	0.13%	-6.91%
Anderson Hospital	-1.19%	5.16%	6.73%	0.31%	3.74%	9.11%	13.05%	7.59%	17.34%	11.04%
Carlinville Area Hospital	11.32%	8.46%	5.97%	-3.20%	1.16%	1.19%	-0.73%	9.79%	3.83%	-0.36%
Community Memorial Hospital	6.60%	1.83%	2.97%	3.87%	1.16%	1.54%	1.52%	2.73%	5.34%	-4.09%
Gateway Regional Med. Ctr.	13.31%	7.76%	2.47%	-1.27%	-7.69%	-2.18%	-2.04%	2.38%	2.51%	2.96%
HSHS Holy Family Hospital ⁶	-0.13%	-5.19%	-5.81%	-1.51%	-5.60%	-4.61%	-1.22%	-6.25%	-15.84%	10.86%
Jersey Community Hospital	2.78%	0.19%	-3.86%	3.71%	-2.07%	-3.37%	2.94%	4.71%	2.81%	1.81%
Memorial Hospital	4.65%	5.39%	6.95%	7.40%	9.92%	0.44%	7.98%	13.17%	-4.96%	-4.01%
Memorial Hospital East ⁷	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	-100.67%	-41.91%
OSF Saint Anthony's Health Center ⁸	2.03%	0.69%	4.57%	0.40%	7.54%	8.01%	-8.83%	-1.91%	-10.88%	-6.68%
St. Elizabeth's Hospital	-8.03%	-5.10%	-5.94%	-11.54%	-9.72%	-7.25%	-9.79%	-9.00%	-33.13%	-19.89%
St. Joseph Hospital (Breese, IL)	6.58%	-6.73%	13.04%	21.65%	12.28%	21.21%	27.07%	13.33%	-3.72%	23.98%
St. Joseph Hospital (Highland, IL)	n/a	-3.59%	-3.39%	1.30%	-31.42%	-0.52%	4.40%	1.50%	-3.40%	7.07%
Touchette Regional Hospital ⁹	-0.52%	-4.39%	-2.77%	-9.50%	-3.21%	-2.24%	0.02%	0.15%	1.58%	-0.28%
Aggregate for Illinois Hospitals	1.37%	3.85%	4.11%	0.38%	0.09%	0.67%	2.94%	4.46%	-6.19%	-3.05%
Aggregate for St. Louis Area Hospitals	-3.35%	8.44%	7.39%	4.15%	2.84%	3.85%	4.54%	5.62%	4.75%	3.54%

¹ In March 2015, Mercy acquired Lincoln County Medical Center which was renamed Mercy Hospital Lincoln. Mercy Lincoln's FYE changed to 6/30; thus, only 4 months of data are reported for 2015.

² Mercy acquired St. Anthony's Medical Center in June 2017 which was renamed Mercy Hospital South.

³ Beginning in 2004, St. Alexius-Broadway Campus and St. Alexius-Jefferson Campus reported on a combined basis as St. Alexius Hospital. In December of 2008, Forest Park and St. Alexius Hospitals were acquired by Success Healthcare, and due to the transfer in ownership, 2007 and 2008 data could not be verified. In 2010, St. Alexius Hospital-Forest Park Campus, formerly Forest Park Hospital, was closed.

⁴ Statistics for St. Joseph Health Center-Wentzville are combined under St. Joseph Health Center in St. Charles.

⁵ St. Luke's Hospital acquired Des Peres Hospital in May 2018 which was renamed St. Luke's Des Peres Hospital.

⁶ On 5/2/2016, Greenville Regional Hospital was acquired by Hospital Sisters Health System. The hospital was renamed HSHS Holy Family Hospital.

⁷ Memorial Hospital East in Shiloh, IL opened on May 16, 2016; thus, only 7.5 months of data are reported for 2016.

⁸ Statistics for St. Clare's Hospital are combined under Saint Anthony's Health Center (SAHC). In 2014, SAHC was acquired by OSF. It reported 10 months of data in 2014 and 11 months of data in 2015.

⁹ Beginning in 2009, Kenneth Hall Regional Hospital and Touchette Regional Hospital reported on a consolidated basis. Kenneth Hall Regional Hospital closed at the end of 2009.

Sources: Centers for Medicare and Medicaid Services Medicare Cost Reports and audited hospital financial statements. All data in this table are not adjusted for inflation.

Note: Changes in previously reported data are based on the most current information. Hospitals no longer in operation as of 2017 are not individually listed, but their results for 2008-2017 are included in aggregate figures.