

December 2022

Top 50 Medical Group Parents

Market coverage report



Public, private, and government organizations comprise list of medical group owners

The Permanente Medical Group continues to top the list of the Top 50 Medical Group Parents with over twice the number of unique physicians as second ranked University of California Health. The Permanente Medical Groups are eight physician-led groups located in California, Washington, Oregon, Colorado, Hawaii, Georgia, Washington, D.C., and three Mid-Atlantic states. Within these areas, the Permanente Medical Groups provide care with more than 17,100 doctors in 610 offices.

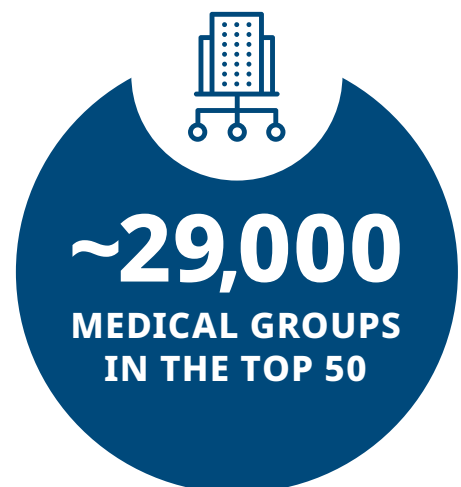
Moving into the third rank, UnitedHealth Group has over twice as many work sites as Kaiser or University of California Health, however, they maintain fewer doctors per site. Their recent acquisition strategy, including the highly visible acquisition of Optum, has contributed to their new position. Similarly, Veteran's Health Administration, CommonSpirit Health, and HCA, all in the top 10, have lower physician coverage per site and a higher number of practices. All top 10 entities except UnitedHealth Group, fall into our class-of-trade definition of an Integrated Health System. UnitedHealth Group is classified as a corporate owner.

All told, the 50 organizations that comprise this chart own and manage ~29,000 medical sites with ~174,000 physicians. Why are these metrics useful to the healthcare industry? Consultants, analysts, marketers, and commercial team leaders can benefit from a complete view of the medical office landscape to see how providers are connected and interact at every level of ownership. This knowledge enables allocation of resources based on the size and locations of the group, accurate targeting of the group's stakeholders, and identification of affiliated sites and specialties.

An understanding of medical group size, practice specialty, ownership, and location helps commercial teams prepare for physician engagements

Methodology

The Top 50 Medical Group Parents Report is derived from OneKey, a best-of-breed commercial reference database from IQVIA consisting of 11.1 million U.S. healthcare professionals and ~752,000 organizations. The parents are ranked by the number of unique physicians working within their medical groups. Physician affiliations is defined as the total number of physicians assigned to one or more sites. A medical group is defined as an outpatient center that may be a single specialty or multi-specialty business. Typically, it is comprised of two or more prescribers and other non-prescribers, such as nurses and technicians. Other types of outpatient centers under the OneKey class-of-trade such as imaging centers and surgery centers are not counted in this report. The OneKey database is continuously updated and enhanced through a blend of primary research, transactional data, customer change requests, and trusted government and industry sources.



50 largest medical group parents

RANK	CORPORATE PARENT	CITY	STATE	TOTAL AFFILIATED PHYSICIANS	UNIQUE PHYSICIANS	MEDICAL GROUP SITE COUNT
1	Kaiser Permanente	Oakland	CA	22,572	17,144	610
2	University of California Health	Oakland	CA	9,971	7,735	636
3	UnitedHealth Group	Minnetonka	MN	9,245	7,100	1,476
4	Ascension Health	Saint Louis	MO	8,137	6,799	1,669
5	Veterans Health Administration	Washington	DC	6,199	5,942	906
6	CommonSpirit Health	Chicago	IL	7,461	5,887	1,208
7	Mayo Clinic Health System	Rochester	MN	6,651	5,706	166
8	HCA Healthcare, Inc	Nashville	TN	6,440	5,340	1,497
9	The University of Texas System	Austin	TX	6,022	4,910	445
10	Trinity Health	Livonia	MI	5,455	4,495	993
11	Providence	Renton	WA	5,153	4,343	912
12	New York Presbyterian Healthcare System	New York	NY	5,644	4,307	454
13	Mass General Brigham	Boston	MA	5,033	4,174	508
14	UPMC	Pittsburgh	PA	5,509	4,073	948
15	Sutter Health	Sacramento	CA	5,034	3,844	510
16	Advocate Aurora Health	Downers Grove	IL	4,163	3,373	593
17	Johns Hopkins Health System	Baltimore	MD	4,223	3,203	257
18	Northwell Health	New Hyde Park	NY	3,632	3,022	674
19	Fresenius Medical Care Holdings, Inc	Waltham	MA	5,418	2,995	2,109
20	Mount Sinai Health System	New York	NY	3,672	2,954	332
21	BJC Healthcare	Saint Louis	MO	4,084	2,813	302
22	NYU Langone Health	New York	NY	3,556	2,731	329
23	Cleveland Clinic	Cleveland	OH	3,212	2,719	375
24	Penn Medicine	Philadelphia	PA	3,565	2,660	337
25	Intermountain Healthcare	Salt Lake City	UT	3,027	2,541	477
26	Yale New Haven Health System	New Haven	CT	3,293	2,418	329
27	University of Colorado Health	Aurora	CO	3,122	2,368	289
28	Defense Health Agency Headquarters	Falls Church	VA	2,435	2,368	214
29	Baylor Scott & White Health	Dallas	TX	2,975	2,363	462
30	Mercy	Chesterfield	MO	3,008	2,331	648
31	Stanford Health Care	Stanford	CA	2,784	2,312	210
32	Bon Secours Mercy Health, Inc	Cincinnati	OH	2,998	2,297	762
33	Indiana University Health	Indianapolis	IN	2,762	2,232	316
34	Northwestern Medicine	Chicago	IL	2,777	2,203	276
35	Atrium Health	Charlotte	NC	2,773	2,200	506
36	Banner Health	Phoenix	AZ	2,638	2,188	295
37	UNC Health Care System	Chapel Hill	NC	2,814	2,138	383
38	Community Health Systems, Inc	Franklin	TN	2,475	2,135	761
39	Jefferson Health	Philadelphia	PA	2,914	2,120	314
40	SSM Health	Saint Louis	MO	2,676	2,112	386
41	Davita, Inc	Denver	CO	3,454	2,103	1,712
42	Duke University Health System	Durham	NC	2,958	2,059	278
43	UAB Health System	Birmingham	AL	2,678	2,058	150
44	Emory Healthcare, Inc	Atlanta	GA	2,485	2,030	212
45	AdventHealth	Altamonte Springs	FL	2,306	1,989	567
46	Prisma Health	Greenville	SC	2,402	1,938	295
47	UW Medicine	Seattle	WA	2,418	1,907	208
48	Beth Israel Lahey Health	Cambridge	MA	2,157	1,887	280
49	Medical University of South Carolina Medical Center	Charleston	SC	2,684	1,840	192
50	Vanderbilt Health	Nashville	TN	2,471	1,839	175

20 top medical group specialties

RANK	PRIMARY SPECIALTY DESCRIPTION	PHYSICIAN COUNT	SITE COUNT
1	Multispecialty group practice	103,358	6,145
2	Family practice	66,987	24,278
3	Primary care	58,262	14,377
4	Pediatric medicine	46,070	12,736
5	Internal medicine	45,248	12,485
6	Obstetrics/Gynecology	33,189	11,272
7	Cardiology	30,802	8,360
8	Orthopedics	28,228	9,068
9	Behavioral health	24,262	9,874
10	Oncology	22,521	5,709
11	Neurology	22,041	6,053
12	General surgery	21,874	5,634
13	Ophthalmology	16,401	9,123
14	Urgent care	16,296	6,450
15	Anesthesiology	15,837	1,351
16	Radiology	13,985	1,718
17	Gastroenterology	13,890	4,534
18	Emergency medicine	13,632	1,437
19	Dermatology	13,433	7,528
20	Pulmonary disease	11,389	3,333