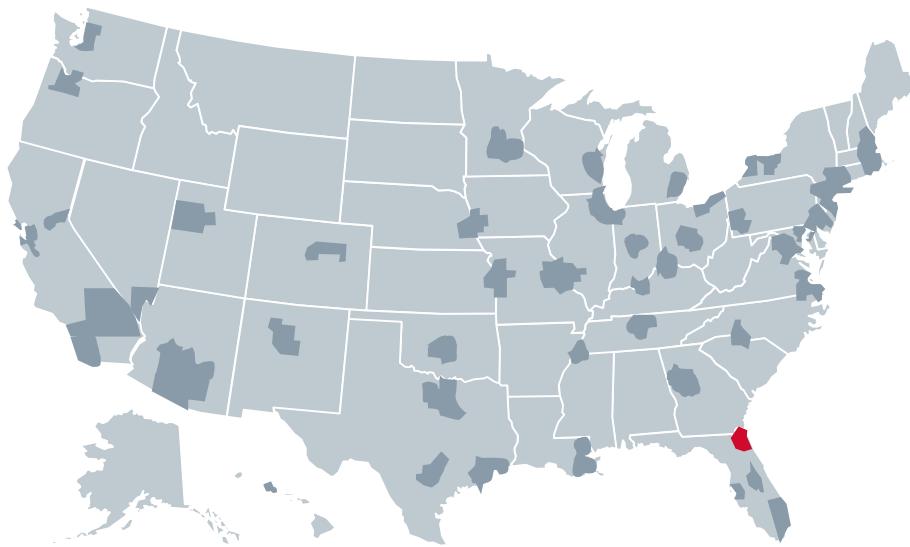


## Jacksonville



### Counties Covered:

County	State
Baker County	FL
Clay County	FL
Duval County	FL
Nassau County	FL
St. Johns County	FL

### Total Population:

- 1,537,651

### Market Summary

- **Overview:** Jacksonville is a developing health care market with a mostly middle-aged, middle class population. Florida recently repealed most of its certificate of need (CON) program, which will eliminate the CON requirement for general hospitals, complex medical rehabilitation beds, and tertiary hospital services as of July 1, 2019.
- **Health Systems:** Health systems are a key market driver, and are moderately consolidated. Baptist Health, Ascension Health, and HCA control nearly 75% of the market.
- **Insurers:** Nearly a third of Jacksonville's population uses Medicare. On the commercial side, BlueCross BlueShield and United Healthcare are the major players.
- **Physicians:** Physicians are largely unconsolidated. Florida faces an aging physician population, with 15% of physicians planning to retire by 2022.
- **Employers:** The top employers in Jacksonville include the US government, Duval County Public Schools, the State of Florida, and Baptist Health System, Inc.
- **Population:** Jacksonville's population is mostly middle-aged, middle class, and relatively healthy. However, there is a considerable elderly and aging population that will require more advanced at-home and palliative care. Due to the wide range of age distribution, the population will also demand coordinated multigenerational care.

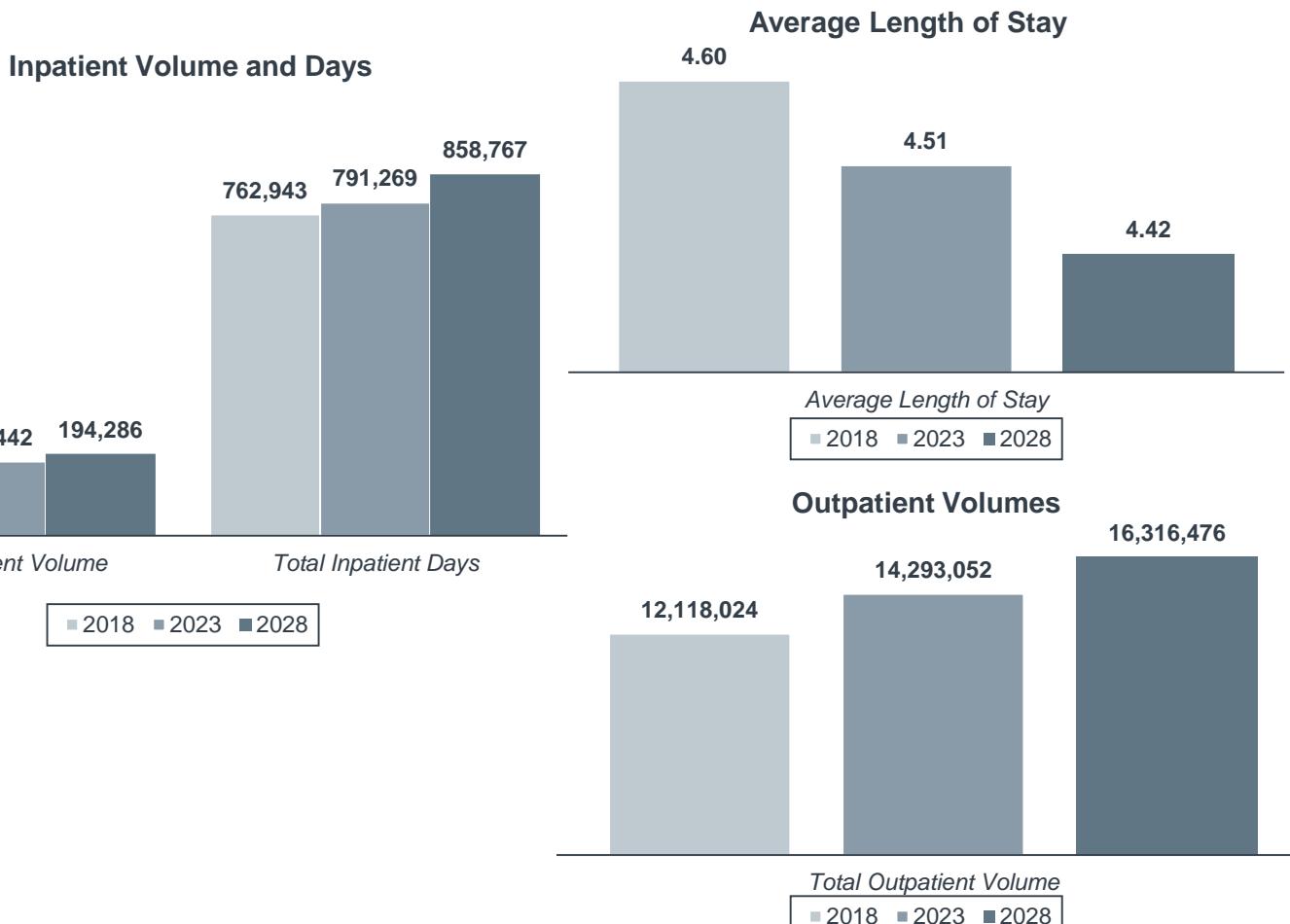
Source: "2017 Physician WORKFORCE Annual Report", Florida Health, 2017, <http://www.floridahealth.gov/provider-and-partner-resources/community-health-workers/physician-workforce-development-and-recruitment/2017-doh-physician-workforce-report.pdf>; Advisory Board research and analysis.

# Market Glimpse

## Key Figures in 2016

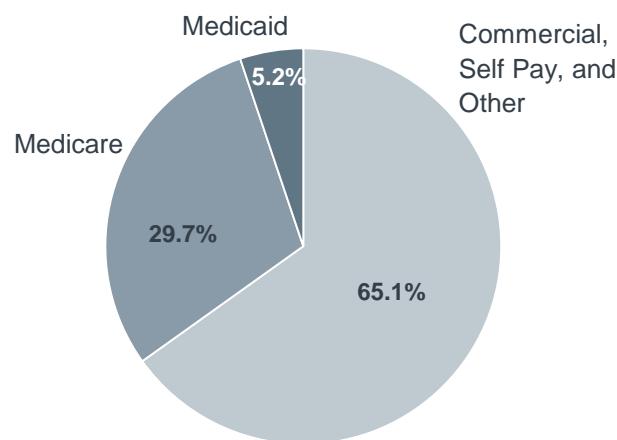


Category	Figure
Acute-Care Hospitals	12
Acute-Care Beds	3,705
Number of Clinicians	10,684
Households Count	607,662
Median Age	38.1
Median Household Income	\$60,892
Per Capita Income	\$30,863
Patients Who Visited a Doctor in the Past Year	76.2%
Unemployment Rate	3.7%
Uninsured Rate	Medium-Low

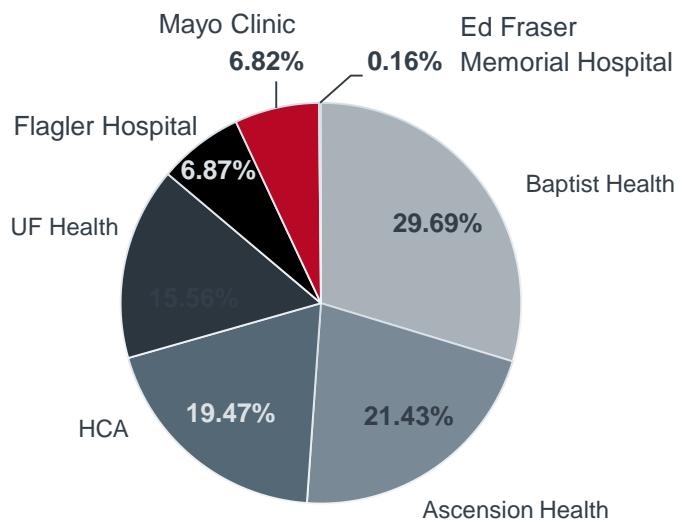


# Overview of Payers, Inpatient Players, Major Ailments

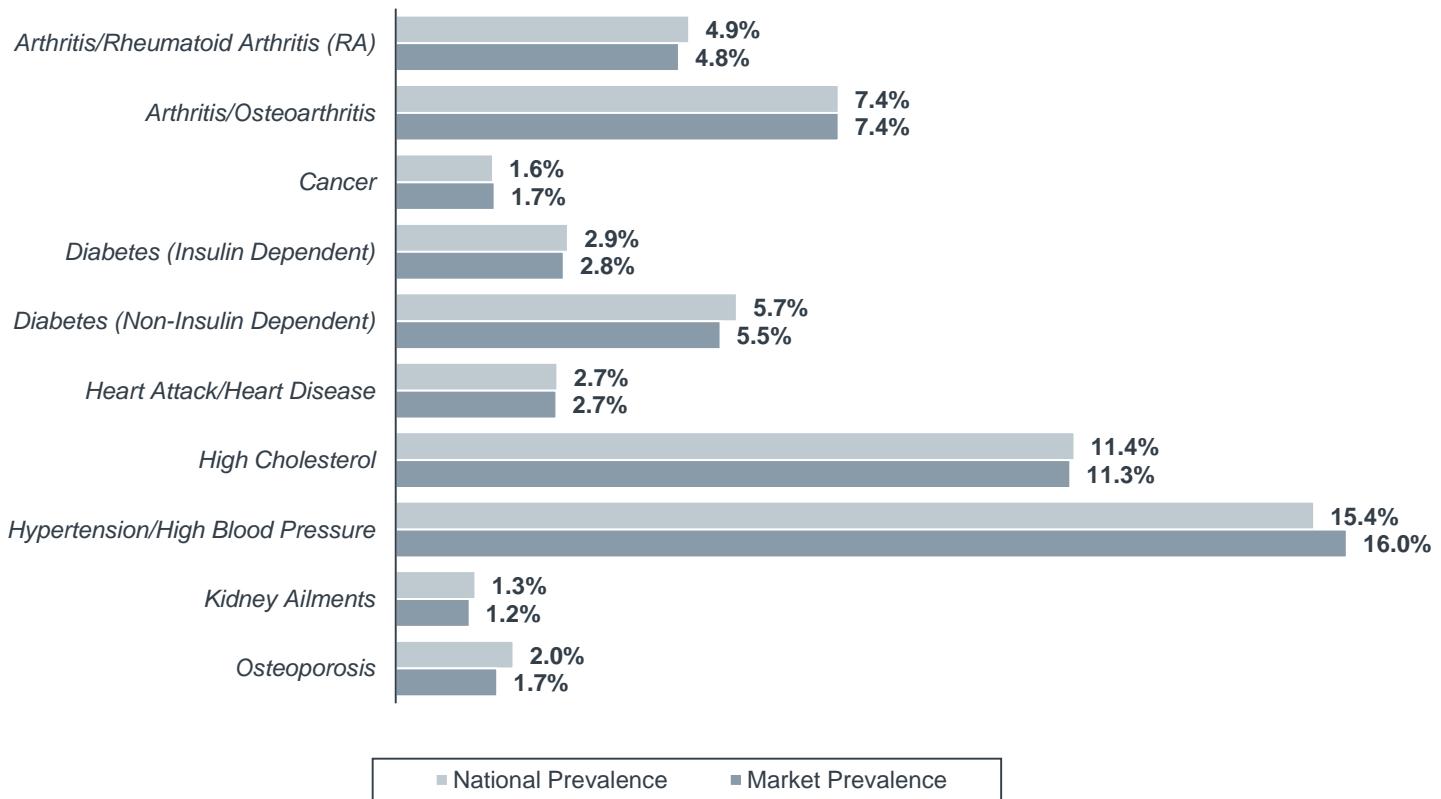
## Discharge Mix



## Inpatient Market Share Breakdown



## Prevalence of Ailments



Source: Advisory Board research and analysis.

# Population Stratification

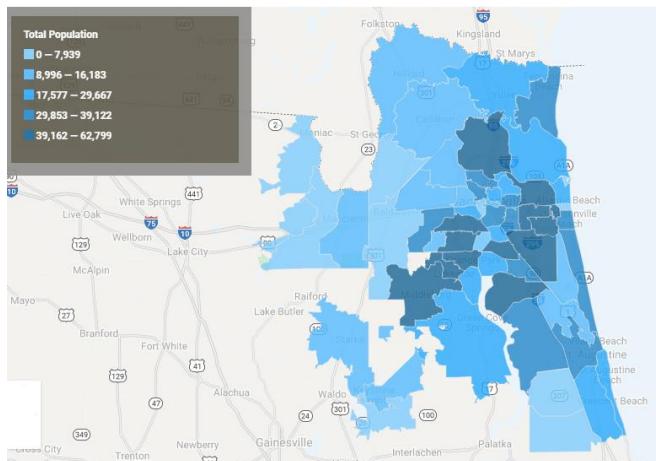
## Segmentation by Age

Age Group	% of Population in 2018
0-9	12.4%
10-19	12.2%
20-29	13.6%
30-39	13.6%
40-49	12.5%
50-59	13.7%
60-69	11.8%
70-79	6.9%
80+	3.5%

## Outpatient Sites of Care Volume Projections

Site of Care	2018 Volume	2028 Volume
Hospital Outpatient Department	1,263,237	1,648,363
Emergency Department	580,515	833,925
Ambulatory Surgery	1,358,366	1,848,358
Physician Office/Clinic	5,701,360	7,619,858
Endoscopy	214,686	293,004
Oncology Center	582,866	777,677
Sleep Studies	109,712	148,740
Advanced Imaging	514,265	664,062
Physical Therapy	649,528	907,454
Lab	1,122,349	1,540,739
Other	21,139	34,295

## Population Density



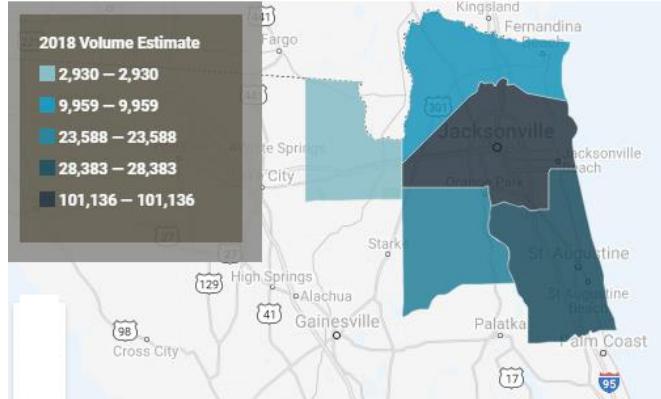
## Segmentation by Gender

Gender	Population Count in 2018	Projected Population Count in 2023
Male	749,883	822,550
Female	787,769	866,059

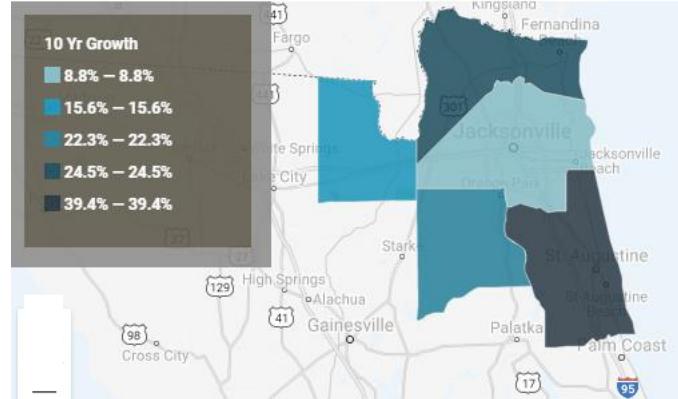
Source: Advisory Board research and analysis.

# Inpatient Volume Projections

## 2018 Inpatient Volumes



## 2028 Inpatient Volumes (10-Year Growth)



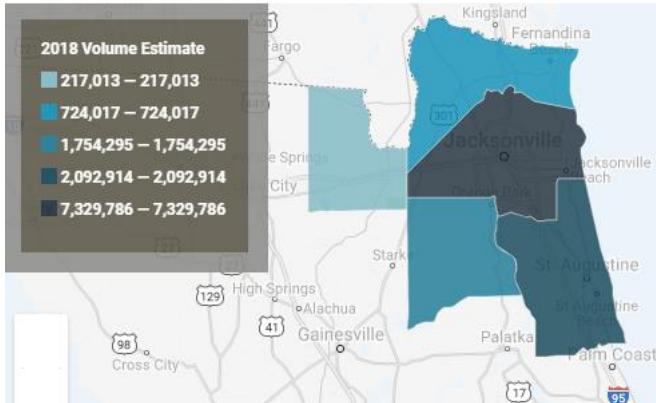
## Service Line Volume Projections

Service Line	2018 Volume Estimate	2023 Volume Forecast	2028 Volume Forecast	5 Yr Growth	10 Yr Growth
Cardiac Services	16,994	16,120	18,050	▼ -5.1%	▲ 6.2%
ENT	1,684	1,671	1,819	▼ -0.8%	▲ 8.0%
General Medicine	58,293	64,899	73,711	▲ 11.3%	▲ 26.4%
General Surgery	11,269	11,896	13,045	▲ 5.6%	▲ 15.8%
Gynecology	1,794	1,739	1,851	▼ -3.1%	▲ 3.2%
Invalid	364	314	322	▼ -13.7%	▼ -11.5%
Neonatology	18,937	19,949	21,233	▲ 5.3%	▲ 12.1%
Neurology	6,828	7,333	8,366	▲ 7.4%	▲ 22.5%
Neurosurgery	1,150	1,376	1,598	▲ 19.7%	▲ 39.0%
Obstetrics	20,582	21,771	23,318	▲ 5.8%	▲ 13.3%
Oncology/Hematology (Medical)	4,671	4,913	5,409	▲ 5.2%	▲ 15.8%
Ophthalmology	190	181	188	▼ -4.7%	▼ -0.9%
Orthopedics	10,467	11,041	12,261	▲ 5.5%	▲ 17.1%
Other Trauma	1,356	1,508	1,746	▲ 11.3%	▲ 28.8%
Rehabilitation (Acute Care)	1,772	992	846	▼ -44.0%	▼ -52.3%
Spine	3,840	3,851	4,080	▲ 0.3%	▲ 6.3%
Thoracic Surgery	906	974	1,039	▲ 7.5%	▲ 14.7%
Urology	2,123	2,334	2,620	▲ 9.9%	▲ 23.4%
Vascular Services	2,776	2,581	2,784	▼ -7.0%	▲ 0.3%

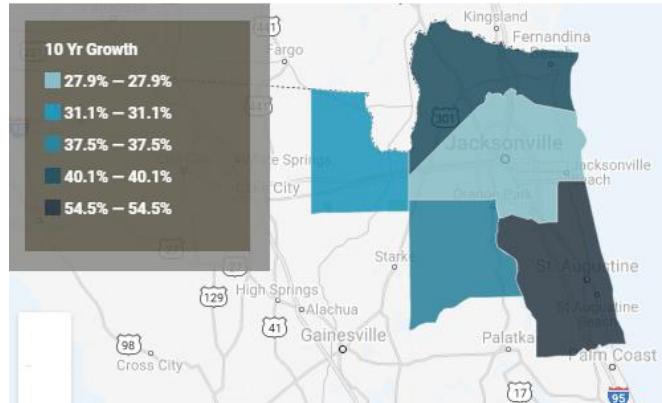
Source: Advisory Board research and analysis.

# Outpatient Volume Projections

## 2018 Outpatient Volumes



## 2028 Outpatient Volumes (10-Year Growth)



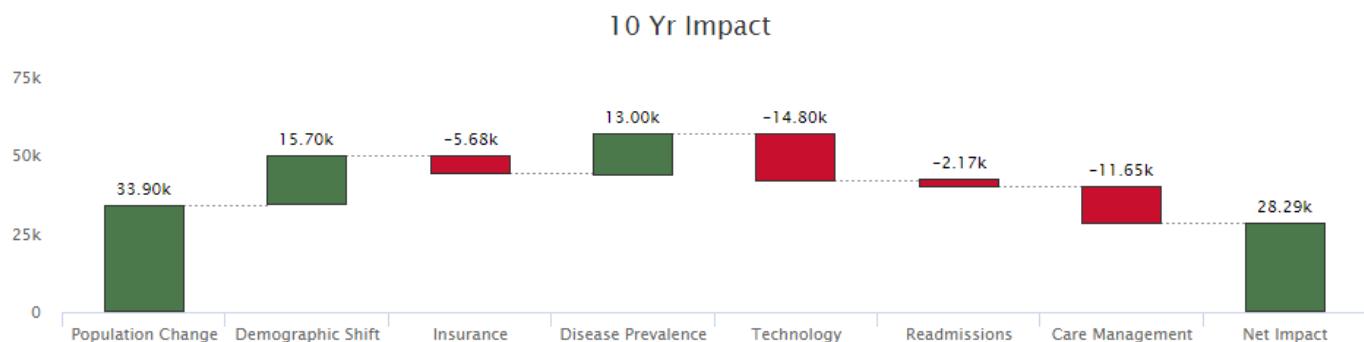
## Service Line Volume Projections

Service Line	2018 Volume Estimate	2023 Volume Forecast	2028 Volume Forecast	5 Yr Growth	10 Yr Growth
Cardiology	416,853	493,275	580,769	▲ 18.3%	▲ 39.3%
Cosmetic Procedures	34,166	42,634	46,768	▲ 24.8%	▲ 36.9%
Dermatology	243,885	297,425	348,214	▲ 22.0%	▲ 42.8%
Endocrinology	3,485	5,381	6,306	▲ 54.4%	▲ 80.9%
ENT	141,347	177,012	216,172	▲ 25.2%	▲ 52.9%
Evaluation and Management	4,470,099	5,082,816	5,731,248	▲ 13.7%	▲ 28.2%
Gastroenterology	120,695	153,503	180,539	▲ 27.2%	▲ 49.6%
General Surgery	34,761	42,331	48,894	▲ 21.8%	▲ 40.7%
Gynecology	52,272	57,218	61,406	▲ 9.5%	▲ 17.5%
Lab	1,714,705	2,053,273	2,355,992	▲ 19.7%	▲ 37.4%
Miscellaneous Services	861,973	1,061,782	1,213,747	▲ 23.2%	▲ 40.8%
Nephrology	36,136	44,414	52,746	▲ 22.9%	▲ 46.0%
Neurology	67,938	88,917	105,464	▲ 30.9%	▲ 55.2%
Neurosurgery	3,828	4,929	5,995	▲ 28.7%	▲ 56.6%
Obstetrics	22,782	24,098	25,818	▲ 5.8%	▲ 13.3%
Oncology	8,934	9,933	10,866	▲ 11.2%	▲ 21.6%
Ophthalmology	370,303	468,663	555,411	▲ 26.6%	▲ 50.0%
Orthopedics	176,727	235,771	277,059	▲ 33.4%	▲ 56.8%
Pain Management	45,086	58,061	68,622	▲ 28.8%	▲ 52.2%
Physical Therapy/Rehabilitation	1,061,334	1,281,397	1,464,958	▲ 20.7%	▲ 38.0%
Podiatry	67,287	91,107	111,122	▲ 35.4%	▲ 65.1%
Psychiatry	557,948	648,572	708,603	▲ 16.2%	▲ 27.0%
Pulmonology	117,778	147,386	173,408	▲ 25.1%	▲ 47.2%
Radiology	1,312,153	1,499,321	1,699,590	▲ 14.3%	▲ 29.5%
Spine	5,759	7,721	9,077	▲ 34.1%	▲ 57.6%
Thoracic Surgery	1,127	1,580	1,952	▲ 40.2%	▲ 73.1%
Trauma	46,041	51,455	57,082	▲ 11.8%	▲ 24.0%
Urology	67,363	92,223	112,529	▲ 36.9%	▲ 67.0%
Vascular	55,254	70,855	86,118	▲ 28.2%	▲ 55.9%

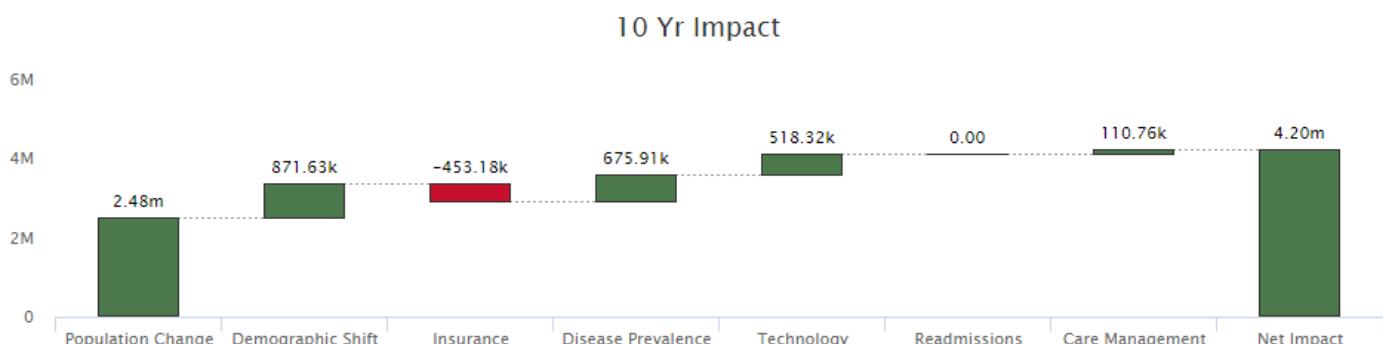
Source: Advisory Board research and analysis.

# Volume Growth Drivers

2018-2028, Factors Influencing Inpatient Procedure Growth



2018-2028, Factors Influencing Outpatient Procedure Growth



- **Population Change:** Considers changes in total population of the market
- **Demographic Shift:** Considers changes in major demographic factors, such as age and gender
- **Insurance:** Considers insurance market factors, such as coverage expansion, increased cost-sharing, and payer scrutiny of medical necessity
- **Disease Prevalence:** Considers the growing population of chronic and multi-morbid patients
- **Technology:** Considers the role technology plays in changing demand and shifting site of care
- **Readmissions:** Considers the ongoing focus on driving down avoidable readmissions
- **Care Management:** Considers investments in care management designed to reduce inpatient utilization

Source: Advisory Board research and analysis.

This Advisory Board resource is part of a series of Market Profiles offered to health care industry members through the Health Care Industry Committee. We have used information and data from Advisory Board's Market Scenario Planner, Clinician Supply Profiler, and Demographic Profiler alongside US government databases including CMS Medicare Cost Reports. Please note that CMS Medicare Cost Reports data are submitted by individual facilities and are thus prone to some degree of inaccuracy due to inconsistent reporting practices and user error. The specific fiscal year reporting period for each provider varies slightly, but all data represent a single-year period for each provider.

These profiles are aimed to help suppliers and service firms better understand provider customers and patients in various markets.



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