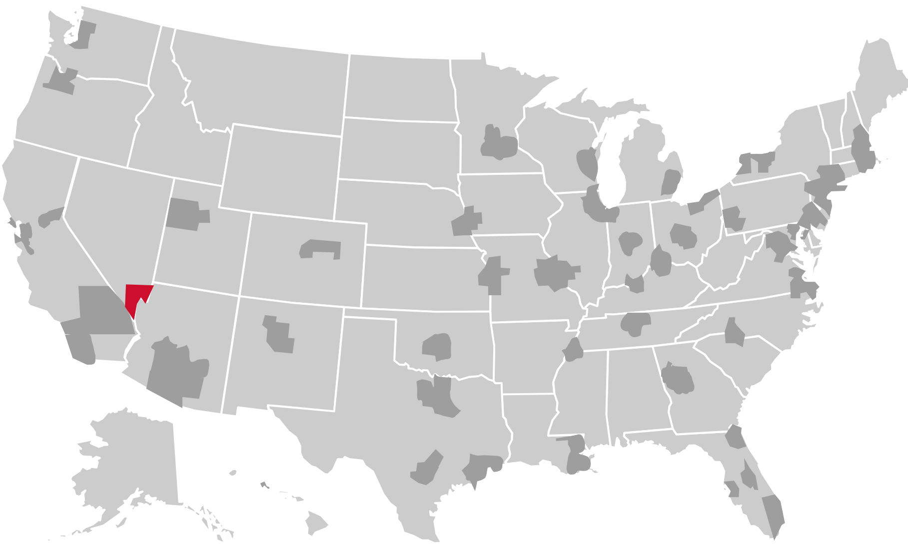
Market Profile

Published by Health Care Industry Committee

Las Vegas, NV



Counties Covered:

County	State
Clark	NV

Total Population:

- 2,222,473

Market Summary

- **Overview**: Las Vegas is a developing market with relatively high unemployment and a substantial uninsured population.
- **Health Systems**: Health systems are highly consolidated, with four major health systems making up over 90% of the market.
- **Insurers**: Las Vegas has a large segment of uninsured patients, in addition to its significant Medicaid population. Among commercial insurers, BlueCross BlueShield, United Healthcare, and Aetna are popular.
- **Physicians**: Physicians are moderately consolidated and are key drivers of market growth. Physicians with larger health systems have not embraced ACOs.
- **Employers**: The largest employers are the county school district and the federal government, followed by various gaming and entertainment industry employers.
- **Population**: Despite high unemployment and relatively lower insurance coverage overall, Las Vegas has a mostly middle-aged, healthy population. This population will drive demand for ambulatory surgery centers and preventive health services. As the population ages, chronic care management demand will increase.

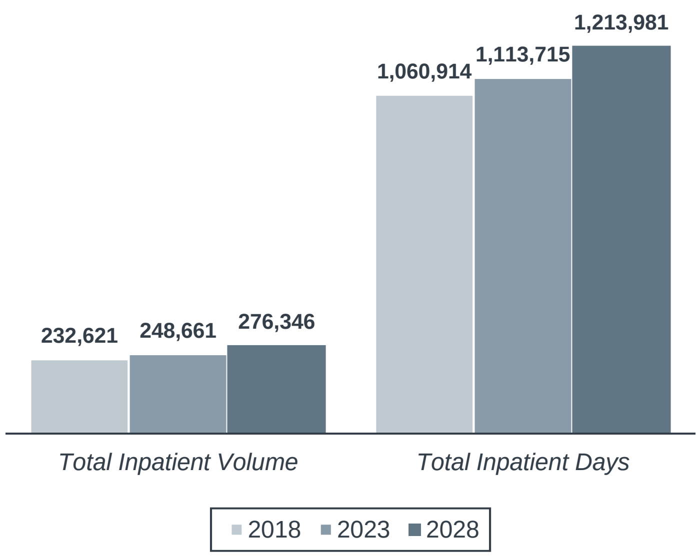
Source: Advisory Board research and analysis.

Market Glimpse

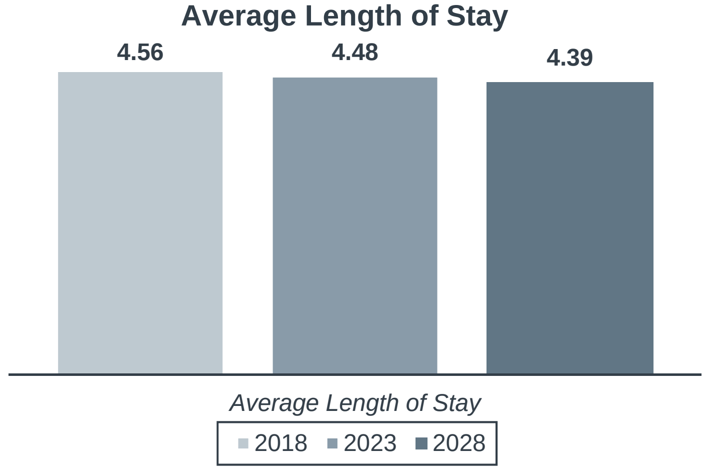
Key Figures

Category	Figure
Acute-Care Hospitals	15
Acute-Care Beds	3,906
Number of Clinicians[1]	10,787
Households Count	833,760
Median Age	36.9
Median Household Income	$58,849
Per Capita Income	$27,763
Patients Who Visited a Doctor in the Past Year	74.7%
Unemployment Rate	4.6%
Uninsured Rate	Medium

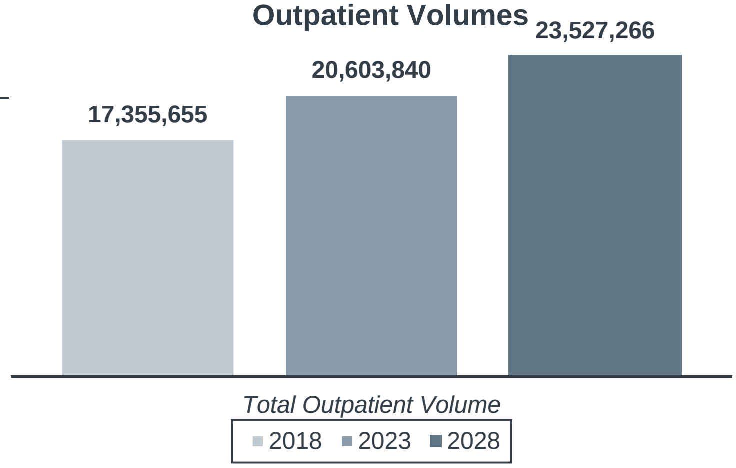
Inpatient Volume and Days



Average Length of Stay



Outpatient Volumes

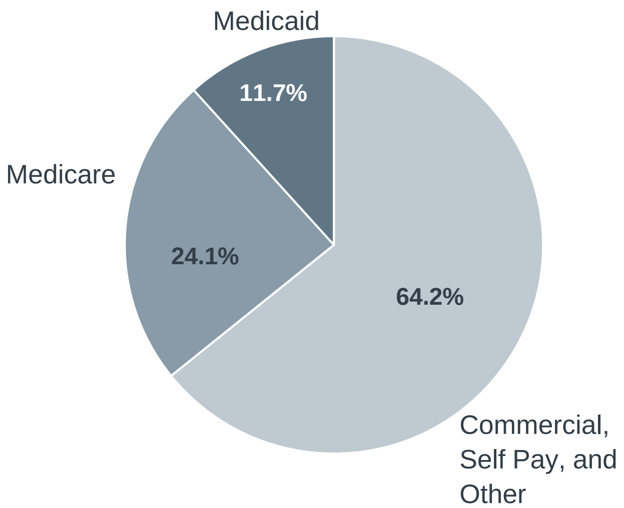


1) Includes primary care physicians, specialists, nurses, advanced practitioners, etc. For a breakdown of clinicians by type, specialty, or sub-specialty, you can use our Clinician Supply Profiler.

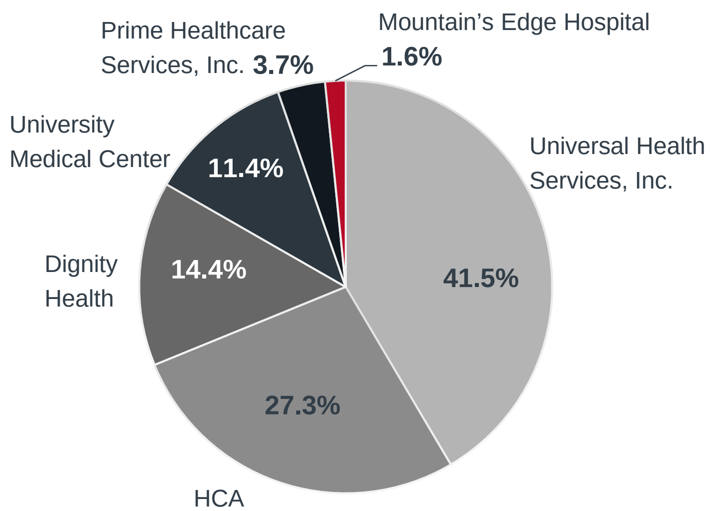
Source: Advisory Board research and analysis.

Overview of Payers, Inpatient Players, Major Ailments

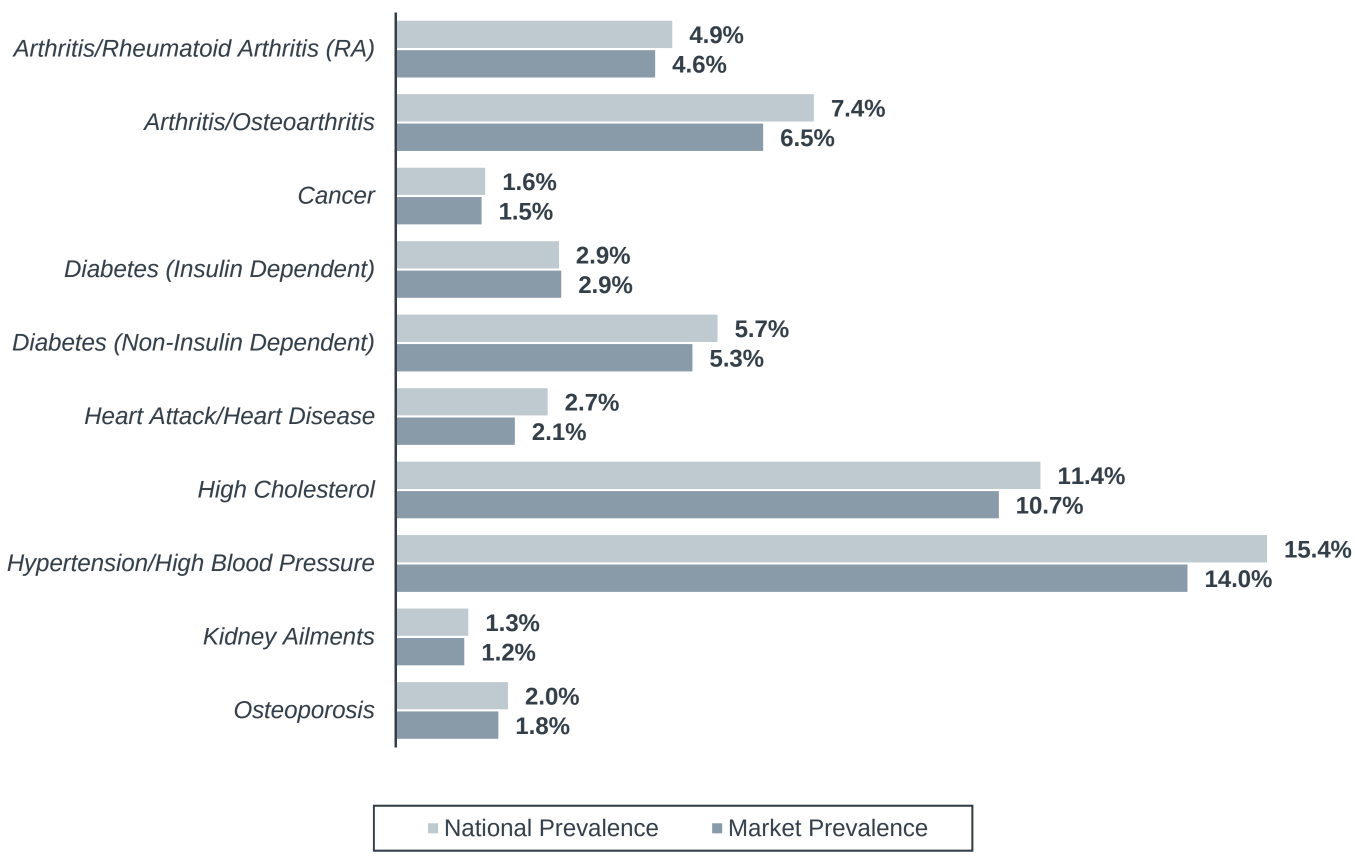
Discharge Mix



Inpatient Medicare Market Share Breakdown



Prevalence of Ailments



Source: Advisory Board research and analysis.

Population Stratification

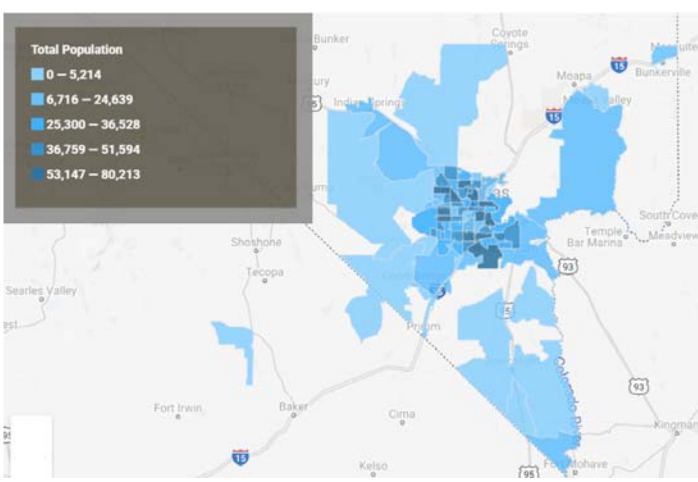
Segmentation by Age

Age Group	% of Population in 2018
0-9	12.9%
10-19	12.6%
20-29	13.7%
30-39	14.3%
40-49	13.5%
50-59	12.7%
60-69	10.6%
70-79	6.6%
80+	3.0%

Outpatient Sites of Care Volume Projections

Site of Care	2018 Volume	2028 Volume
Hospital Outpatient Department	1,792,631	2,359,142
Emergency Department	825,647	1,186,145
Ambulatory Surgery	1,945,631	2,665,852
Physician Office/Clinic	8,203,930	11,030,086
Endoscopy	306,416	421,454
Oncology Center	835,476	1,121,698
Sleep Studies	157,623	215,451
Independent Diagnostic Testing Facility	730,818	950,900
Physical Therapy	936,014	1,326,854
Lab	1,591,922	2,200,777
Other	29,547	48,907

Population Density



Segmentation by Gender

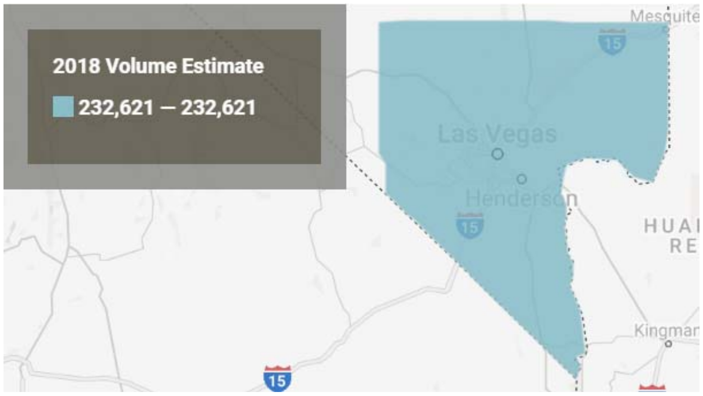
Gender	Population Count in 2018	Projected Population Count in 2023
Male	1,107,284	1,219,680
Female	1,115,182	1,236,962

Source: Advisory Board research and analysis.

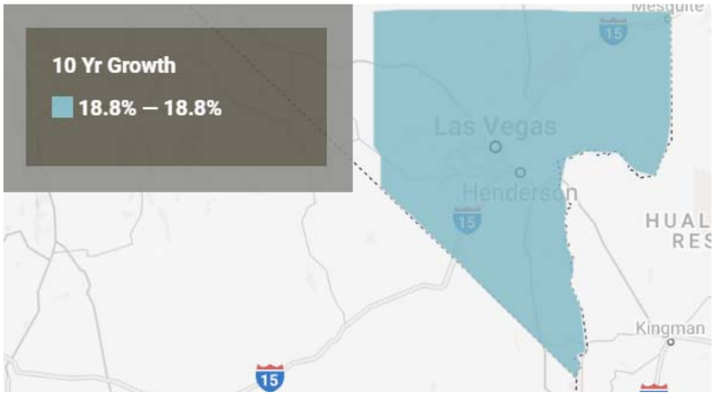
Las Vegas, NV

Inpatient Volume Projections

2018 Inpatient Volumes



2028 Inpatient Volumes (10-Year Growth)



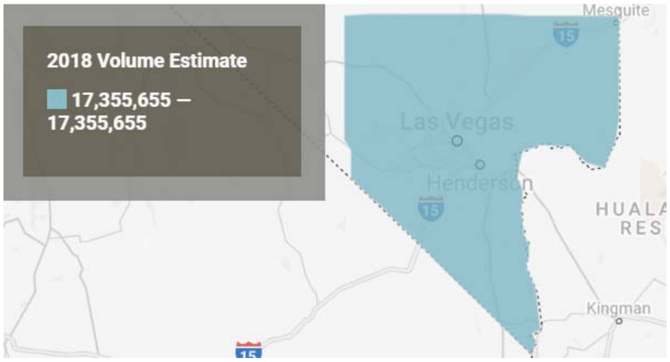
Service Line Volume Projections

Service Line	2018 Volume Estimate	2023 Volume Forecast	2028 Volume Forecast	5 Yr Growth	10 Yr Growth
+ Cardiac Services	23,353	22,437	25,227	-3.9%	8.0%
+ ENT	2,410	2,402	2,620	-0.3%	8.7%
+ General Medicine	81,897	92,256	105,187	12.6%	28.4%
+ General Surgery	15,974	17,016	18,761	6.5%	17.5%
+ Gynecology	2,572	2,515	2,680	-2.2%	4.2%
+ Invalid	510	445	458	-12.7%	-10.2%
+ Neonatology	28,724	30,353	32,347	5.7%	12.6%
+ Neurology	9,496	10,335	11,837	8.8%	24.7%
+ Neurosurgery	1,629	1,964	2,291	20.5%	40.6%
+ Obstetrics	30,406	32,292	34,699	6.2%	14.1%
+ Oncology/Hematology	6,552	6,941	7,669	5.9%	17.0%
+ Ophthalmology	270	260	271	-3.9%	0.2%
+ Orthopedics	14,301	15,251	17,060	6.6%	19.3%
+ Other Trauma	1,899	2,142	2,484	12.8%	30.8%
+ Rehabilitation (Acute Care)	2,439	1,378	1,178	-43.5%	-51.7%
+ Spine	5,383	5,449	5,811	1.2%	7.9%
+ Thoracic Surgery	1,263	1,363	1,462	7.9%	15.7%
+ Urology	3,009	3,333	3,763	10.8%	25.1%
+ Vascular Services	534	528	542	-1.2%	1.4%

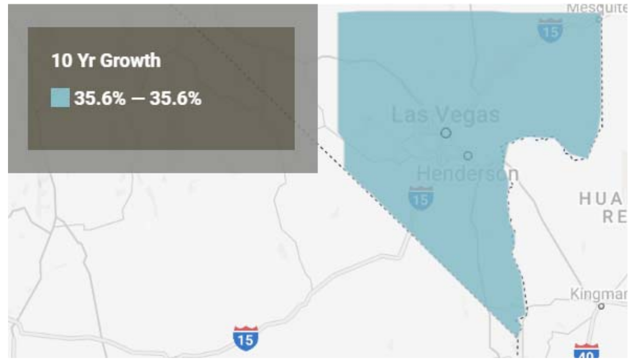
Source: Advisory Board research and analysis.

Outpatient Volume Projections

2018 Outpatient Volumes



2028 Outpatient Volumes (10-Year Growth)



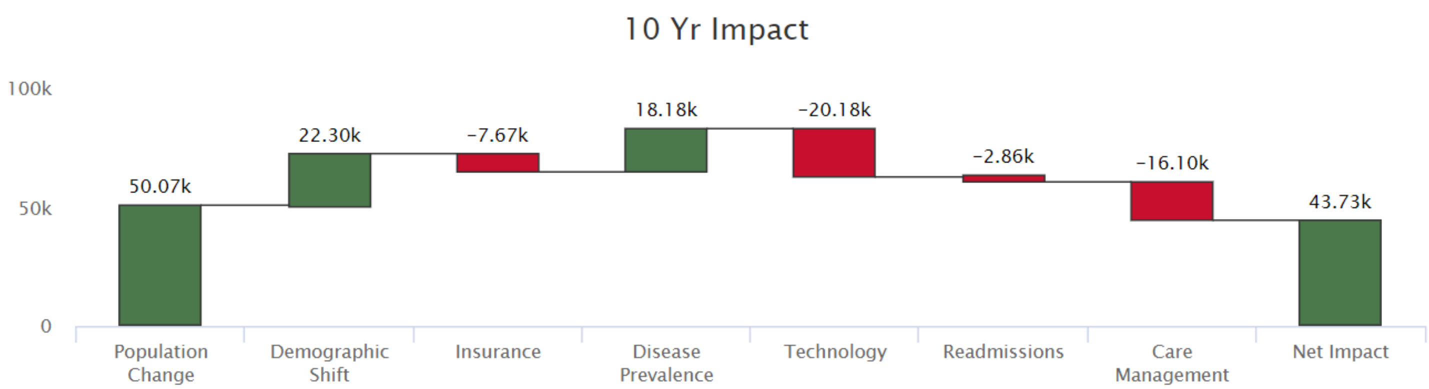
Service Line Volume Projections

Service Line	2018 Volume Estimate	2023 Volume Forecast	2028 Volume Forecast	5 Yr Growth	10 Yr Growth
Cardiology	581,477	693,872	817,857	19.3%	40.7%
Cosmetic Procedures	49,451	62,141	68,404	25.7%	38.3%
Dermatology	348,157	427,802	501,303	22.9%	44.0%
Endocrinology	4,960	7,748	9,150	56.2%	84.5%
ENT	206,346	259,754	317,686	25.9%	54.0%
Evaluation and	6,444,285	7,368,483	8,307,901	14.3%	28.9%
Gastroenterology	168,484	216,266	255,341	28.4%	51.6%
General Surgery	49,550	60,818	70,393	22.7%	42.1%
Gynecology	75,073	82,595	88,728	10.0%	18.2%
Lab	2,429,698	2,928,852	3,361,029	20.5%	38.3%
Miscellaneous Services	1,243,354	1,539,173	1,758,236	23.8%	41.4%
Nephrology	50,521	62,973	75,570	24.6%	49.6%
Neurology	97,972	129,306	153,587	32.0%	56.8%
Neurosurgery	5,536	7,188	8,775	29.8%	58.5%
Obstetrics	33,735	35,755	38,385	6.0%	13.8%
Oncology	12,453	14,019	15,479	12.6%	24.3%
Ophthalmology	513,326	651,343	769,396	26.9%	49.9%
Orthopedics	250,003	336,584	396,666	34.6%	58.7%
Pain Management	63,687	82,650	97,739	29.8%	53.5%
Physical	1,536,375	1,874,821	2,152,026	22.0%	40.1%
Podiatry	90,340	124,267	151,440	37.6%	67.6%
Psychiatry	826,728	969,381	1,059,447	17.3%	28.1%
Pulmonology	170,143	213,861	251,671	25.7%	47.9%
Radiology	1,856,140	2,136,513	2,423,008	15.1%	30.5%
Spine	8,212	11,050	12,974	34.6%	58.0%
Thoracic Surgery	1,571	2,203	2,711	40.3%	72.6%
Trauma	65,504	73,754	81,861	12.6%	25.0%
Urology	95,834	131,733	160,409	37.5%	67.4%
Vascular	76,739	98,933	120,093	28.9%	56.5%

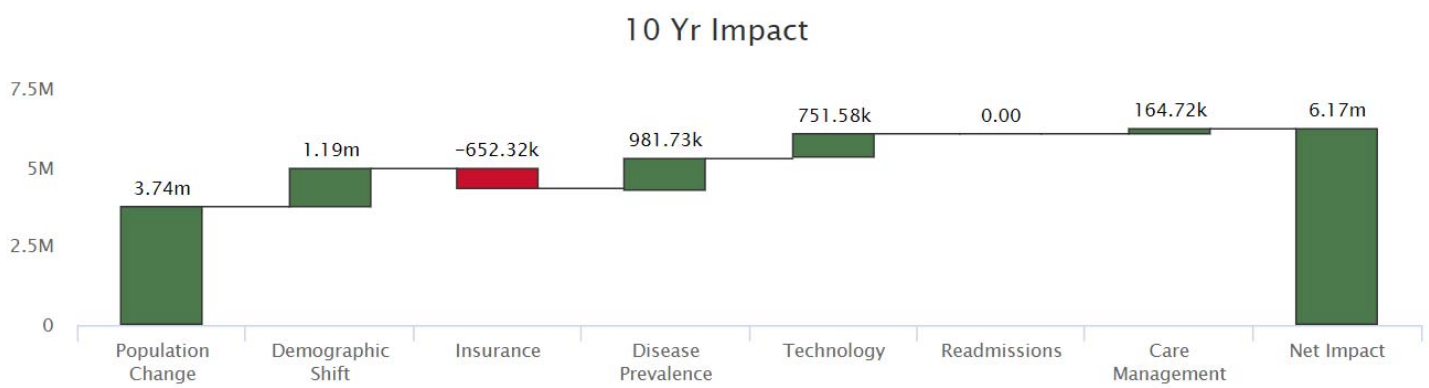
Source: Advisory Board research and analysis.

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.

Advisory Board

655 New York Avenue NW, Washington DC 20001 | **advisory.com**