



ABC Hospital Chronic Conditions Analysis May 2023

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- State of Missouri

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III. Summary of Key Takeaways

Data Sources

- I. Demographics: Esri® current- and five-year population projections (2022 – 2027)
- II. Chronic Conditions Forecasting: Intellimed all-payor claims (2021), Esri® current- and five-year population projections (2022 – 2027), Intellimed Chronic Conditions Forecast, Intellimed Patient Journey

Definitions:

Per Capita Chronic Conditions: The total # of chronic conditions (per diagnosis category, subcategory, and in total) / total population (source Intellimed Chronic Conditions Forecast + Esri)

Per Capita Cost: The estimated 12-month cost to treat a chronic condition (per diagnosis category, subcategory, and in total) / total population (source Intellimed Patient Journey)

► Demographic Overview

Demographic overview: 3-County Market Demographics

ESRI Demographic Snapshot

5/9/2023

INTELLIMED Demographic Profile System

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(County): Henry County, MO, Benton County, MO, Saint Clair County, MO

AZ State

	Area	USA		2022	2027	% Change
2022 Total Population	51,736	335,708,066	Total Male Population	25,853	25,951	0.4%
2027 Total Population	51,733	339,902,589	Total Female Population	25,883	25,782	-0.4%
% Change 2022 - 2027	-0.0%	1.2%	Female Child Bearing Age (15 - 44)	7,291	7,088	-2.8%
2022 Average Household Income	\$67,735	\$105,186	Male Average Age	44.8	45.4	1.5%
2027 Average Household Income	\$77,756	\$122,345	Female Average Age	45.4	46.1	1.4%
2022 Per Capita Household Income	\$29,029	\$40,363				

Age Group	Age Distribution			USA			Race / Ethnicity Distribution					
	2022	% of Total	2027	% of Total	% Change	% Change	Race / Ethnicity	2022 % of Total	2027 % of Total	% Change		
Age 0-4	2,368	4.58%	2,339	4.5%	-1.2%	1.6%	American Indian/Alaska Nati	294	0.6%	299	0.6%	1.7%
Age 5-9	2,597	5.02%	2,564	5.0%	-1.3%	-1.3%	Asian	179	0.3%	182	0.4%	1.7%
Age 10-14	2,688	5.20%	2,791	5.4%	3.8%	-0.1%	Black/African American	305	0.6%	311	0.6%	2.0%
Age 15-19	2,476	4.79%	2,505	4.8%	1.2%	-0.6%	Other Race	387	0.7%	406	0.8%	4.9%
Age 20-24	2,163	4.18%	1,992	3.9%	-7.9%	-3.3%	Pacific Islander	21	0.0%	22	0.0%	4.8%
Age 25-29	2,511	4.85%	2,079	4.0%	-17.2%	-8.0%	Population of 2 or More Rac	3,041	5.9%	3,302	6.4%	8.6%
Age 30-34	2,524	4.88%	2,494	4.8%	-1.2%	1.0%	White	47,504	91.8%	47,194	91.3%	-0.7%
Age 35-39	2,608	5.04%	2,692	5.2%	3.2%	6.5%	Total	51,731	100.0%	51,716	100.0%	-0.0%
Age 40-44	2,519	4.87%	2,740	5.3%	8.8%	6.5%	Hispanic	1,112	2.1%	1,133	2.2%	1.9%
Age 45-49	2,868	5.54%	2,842	5.5%	-0.9%	3.0%	# of Households					
Age 50-54	3,158	6.10%	2,919	5.6%	-7.6%	-6.1%	Household Income	2022	% of Total	2027	% of Total	% Change
Age 55-59	3,943	7.62%	3,431	6.6%	-13.0%	-8.5%	< \$15,000	2,804	12.7%	2,366	10.7%	-15.6%
Age 60-64	4,625	8.94%	4,343	8.4%	-6.1%	-5.2%	\$15,000 - \$24,999	2,433	11.0%	2,027	9.1%	-16.7%
Age 65-69	4,579	8.85%	4,809	9.3%	5.0%	5.7%	\$25,000 - \$34,999	2,516	11.4%	2,240	10.1%	-11.0%
Age 70-74	4,032	7.79%	4,252	8.2%	5.5%	10.5%	\$35,000 - \$49,999	3,538	16.0%	3,551	16.0%	0.4%
Age 75-79	2,956	5.71%	3,241	6.3%	9.6%	22.4%	\$50,000 - \$99,999	6,749	30.5%	6,774	30.5%	0.4%
Age 80-84	1,669	3.23%	2,091	4.0%	25.3%	26.9%	Over \$100,000	4,117	18.6%	5,246	23.6%	27.4%
Age 85+	1,452	2.81%	1,609	3.1%	10.8%	8.5%	Total	22,157	100.0%	22,204	100.0%	0.2%
Total	51,736	100.00%	51,733	100.0%	-0.0%	1.2%						

Key Takeaways

Henry, Benton, and St. Clair counties are expected to have a net decline in population in 2027, with significant shifts in age groups. Increases for ages 65+ Medicare populations and decreases in ages 45-64 commercial payer populations will result in additional financial burden for the market due to lower reimbursement rates. The estimated average household income for 2022 is 23% lower than the state average and 35% lower than the national average.

Demographic overview: State of Missouri Demographics

ESRI Demographic Snapshot INTELLIMED Demographic Profile System

5/11/2023

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AZ State

County: 130 Selected

	Area	USA
2022 Total Population	6,186,834	335,708,066
2027 Total Population	6,220,059	339,902,589
% Change 2022 - 2027	0.5%	1.2%
2022 Average Household Income	\$88,215	\$105,186
2027 Average Household Income	\$102,480	\$122,345
2022 Per Capita Household Income	\$35,910	\$40,363

	2022	2027	% Change
Total Male Population	3,040,076	3,062,289	0.7%
Total Female Population	3,146,758	3,157,770	0.3%
Female Child Bearing Age (15 - 44)	1,180,030	1,164,422	-1.3%
Male Average Age	38.2	38.8	1.6%
Female Average Age	39.8	40.5	1.7%

Age Group	Age Distribution				USA	
	2022	% of Total	2027	% of Total	% Change	% Change
Age 0-4	357,123	5.77%	357,485	5.7%	0.1%	1.6%
Age 5-9	372,518	6.02%	367,761	5.9%	-1.3%	-1.3%
Age 10-14	380,006	6.14%	383,167	6.2%	0.8%	-0.1%
Age 15-19	382,013	6.17%	386,903	6.2%	1.3%	-0.6%
Age 20-24	395,008	6.38%	380,367	6.1%	-3.7%	-3.3%
Age 25-29	418,876	6.77%	371,505	6.0%	-11.3%	-8.0%
Age 30-34	415,351	6.71%	407,870	6.6%	-1.8%	1.0%
Age 35-39	405,072	6.55%	417,693	6.7%	3.1%	6.5%
Age 40-44	372,650	6.02%	400,002	6.4%	7.3%	6.5%
Age 45-49	356,372	5.76%	373,576	6.0%	4.8%	3.0%
Age 50-54	369,313	5.97%	345,981	5.6%	-6.3%	-6.1%
Age 55-59	413,191	6.68%	361,196	5.8%	-12.6%	-8.5%
Age 60-64	412,167	6.66%	389,664	6.3%	-5.5%	-5.2%
Age 65-69	361,294	5.84%	386,226	6.2%	6.9%	5.7%
Age 70-74	295,081	4.77%	324,185	5.2%	9.9%	10.5%
Age 75-79	210,707	3.41%	251,775	4.0%	19.5%	22.4%
Age 80-84	133,150	2.15%	167,559	2.7%	25.8%	26.9%
Age 85+	136,942	2.21%	147,144	2.4%	7.4%	8.5%
Total	6,186,834	100.00%	6,220,059	100.0%	0.5%	1.2%

Race / Ethnicity	Race / Ethnicity Distribution				
	2022 % of Total		2027 % of Total		% Change
American Indian/Alaska Nati	30,823	0.5%	31,613	0.5%	2.6%
Asian	136,820	2.2%	145,590	2.3%	6.4%
Black/African American	703,581	11.4%	704,747	11.3%	0.2%
Other Race	131,850	2.1%	141,674	2.3%	7.5%
Pacific Islander	9,981	0.2%	10,423	0.2%	4.4%
Population of 2 or More Race	435,663	7.0%	485,950	7.8%	11.5%
White	4,738,112	76.6%	4,700,077	75.6%	-0.8%
Total	6,186,830	100.0%	6,220,074	100.0%	0.5%
Hispanic	309,089	5.0%	320,294	5.1%	3.6%

Household Income	# of Households				
	2022	% of Total	2027	% of Total	% Change
< \$15,000	248,385	9.9%	195,265	7.7%	-21.4%
\$15,000 - \$24,999	216,964	8.7%	181,259	7.2%	-16.5%
\$25,000 - \$34,999	211,587	8.5%	173,478	6.9%	-18.0%
\$35,000 - \$49,999	312,686	12.5%	286,413	11.4%	-8.4%
\$50,000 - \$99,999	798,139	31.9%	800,483	31.7%	0.3%
Over \$100,000	710,776	28.4%	884,653	35.1%	24.5%
Total	2,498,537	100.0%	2,521,551	100.0%	0.9%

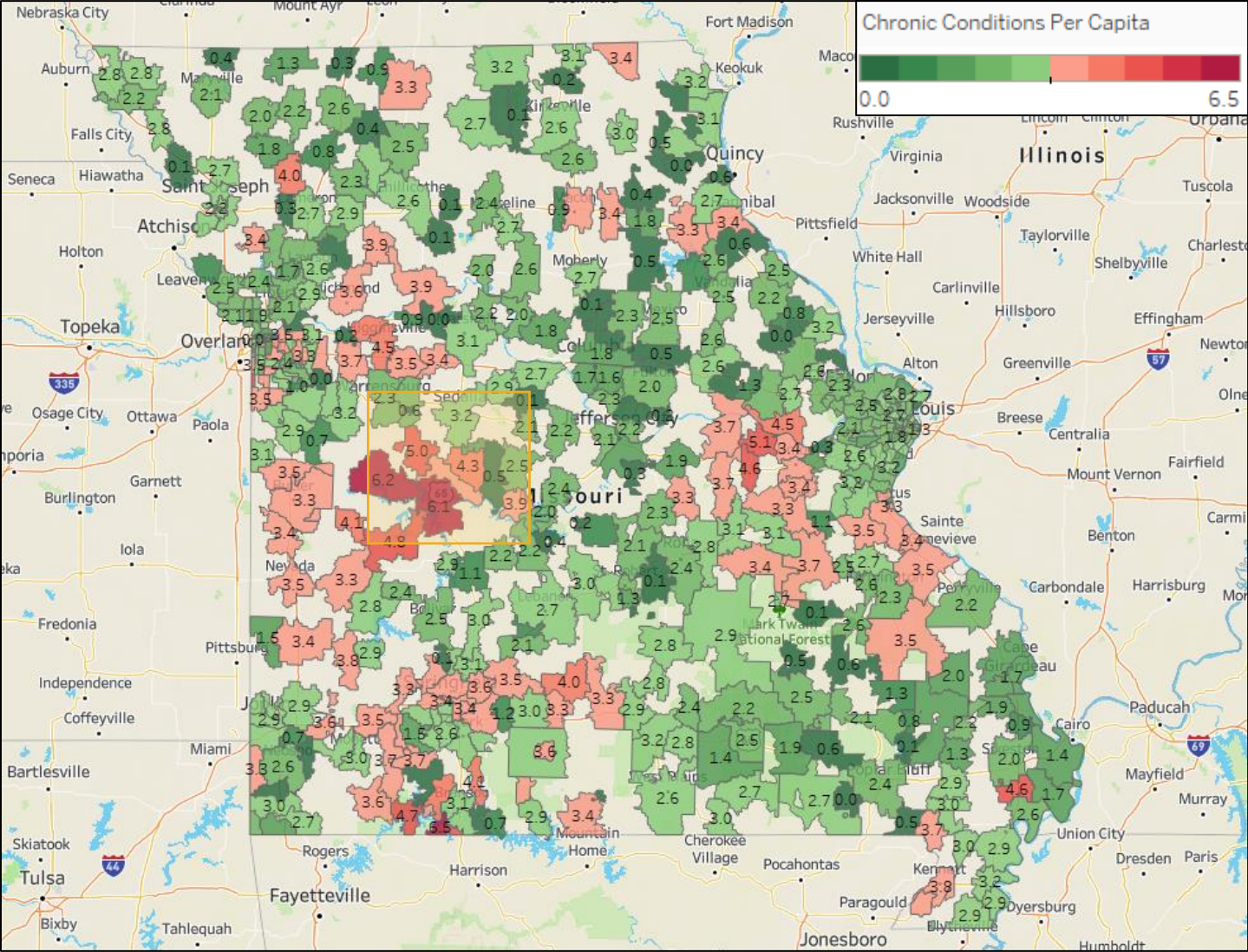
Key Takeaways

The state-wide population is expected to grow less than the national average in 2027, and heavy-utilizing commercial payer healthcare populations ages 50-64 are expected to decline at a higher rate than the national average. Unlike the 3-county market area for ABC Hospital, the race demographics for the state are more diverse, with moderate growth expected for black and mixed-race populations by 2027.

Chronic Conditions

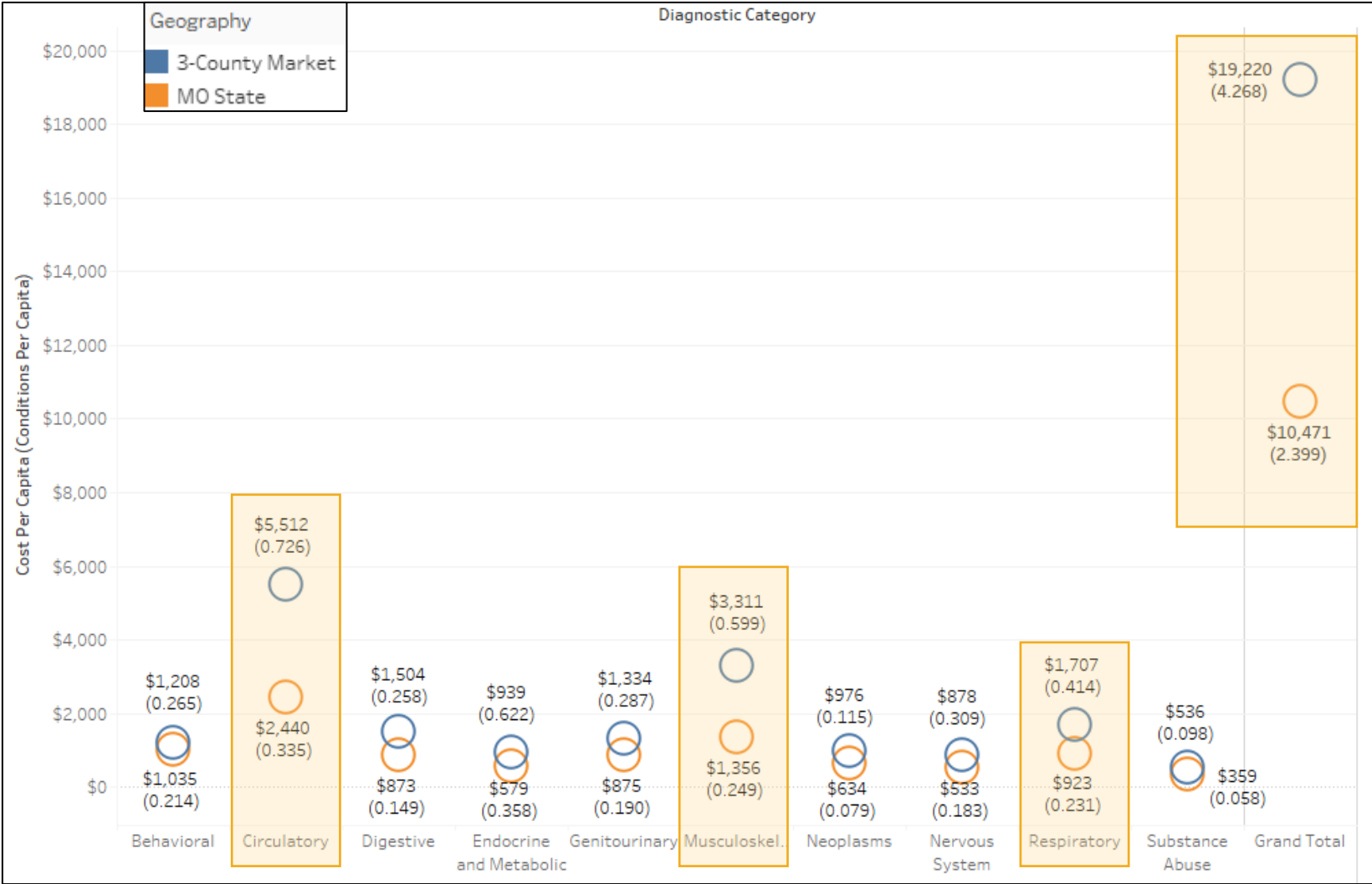
 Forecast

Chronic Conditions – 2022 chronic conditions per capita by zip code map, all chronic conditions, all payors



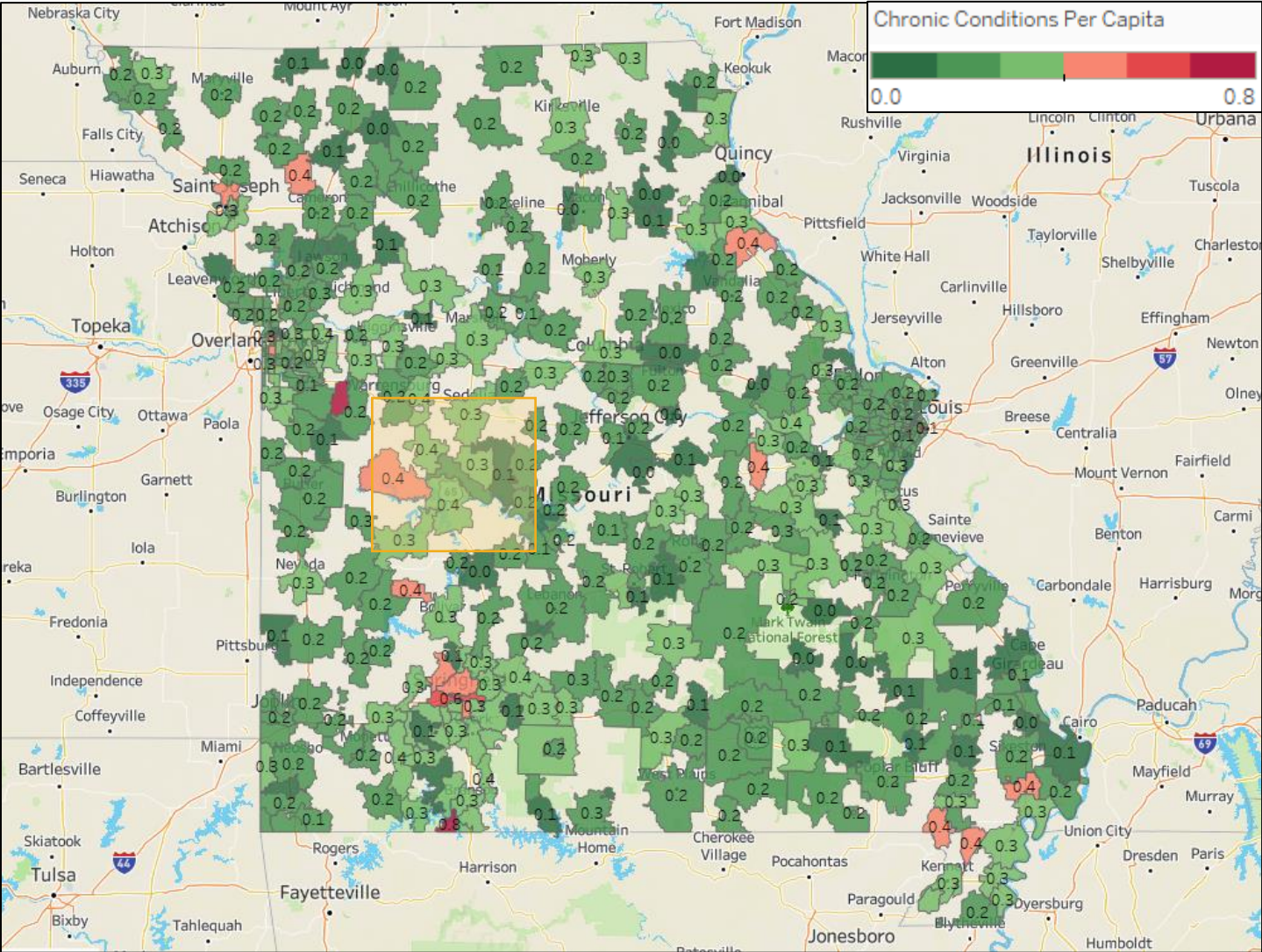
Key Takeaways
2022 chronic conditions per capita in the 3-county market area are significantly higher per zip code than for most other zip codes in the state of MO.

Chronic Conditions – 2022 per capita costs + chronic conditions per capita by diagnosis category, MO state vs. 3-county market, all payors



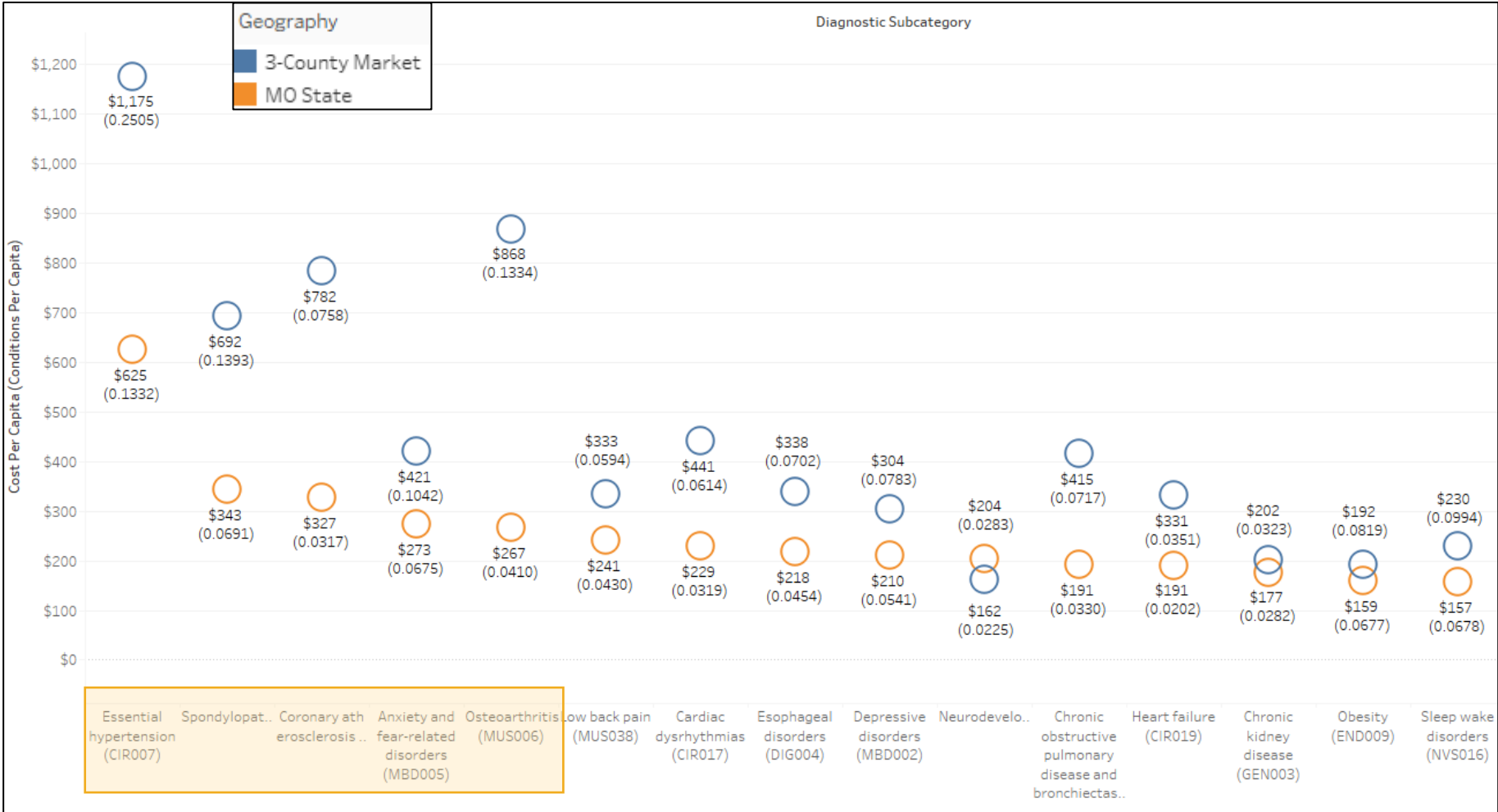
Key Takeaways
 For Henry, Benton and St. Clair counties, there were an estimated 4.3 chronic conditions per capita in 2022 vs. the statewide average of 2.4 resulting in a much higher estimated annual cost per capita of almost \$20K vs. the state average of approximately \$10.5K. Among the categories with the highest variance in prevalence and cost per capita are circulatory, musculoskeletal, and respiratory diseases.

Chronic Conditions – 2022 chronic conditions per capita by zip code map, behavioral health, all payors



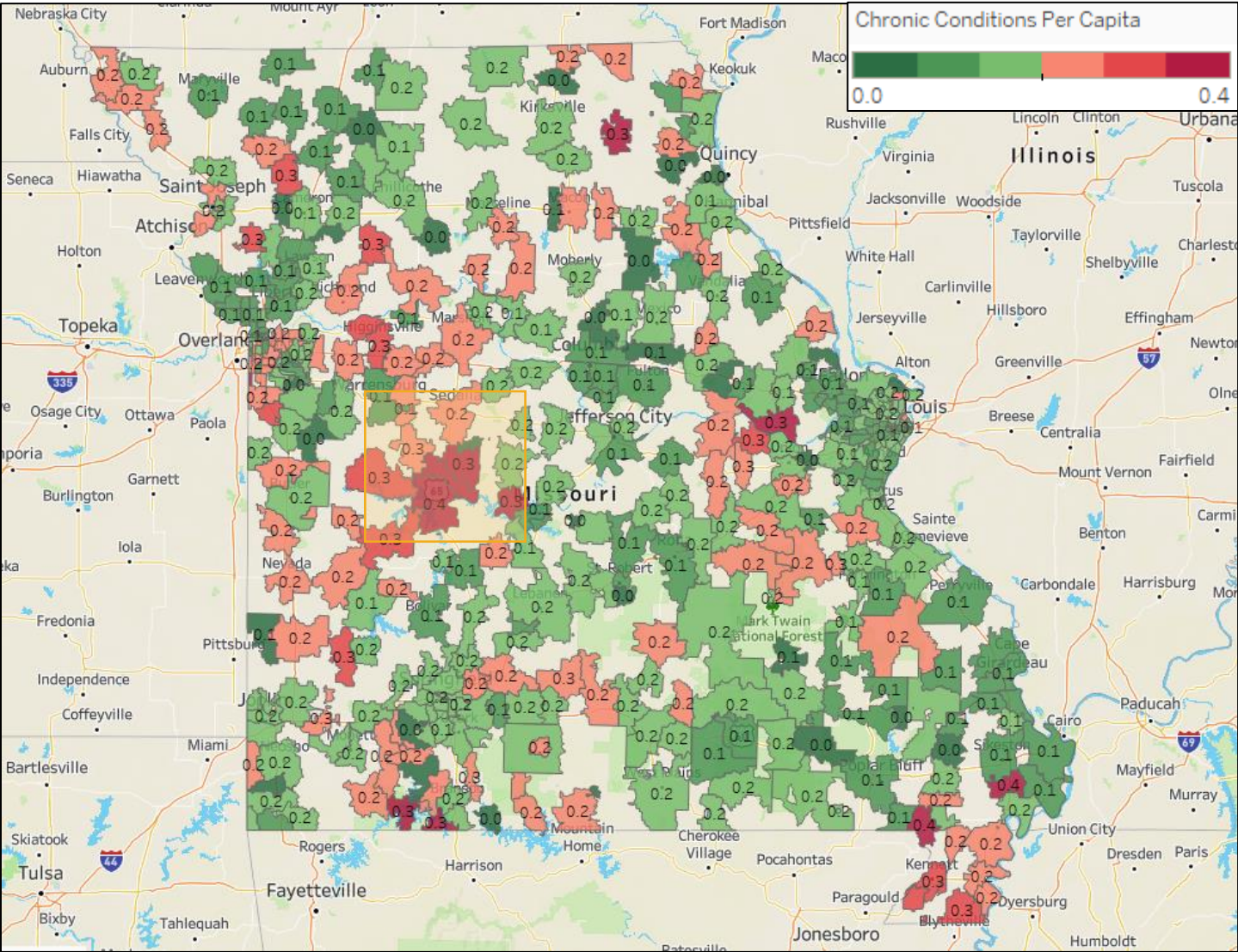
Key Takeaways
Behavioral health chronic condition prevalence rates per capita are fragmented throughout the state of MO.

Chronic Conditions – 2022 per capita costs + chronic conditions per capita by diagnosis subcategory, MO state vs. 3-county market, all payors (top 15)



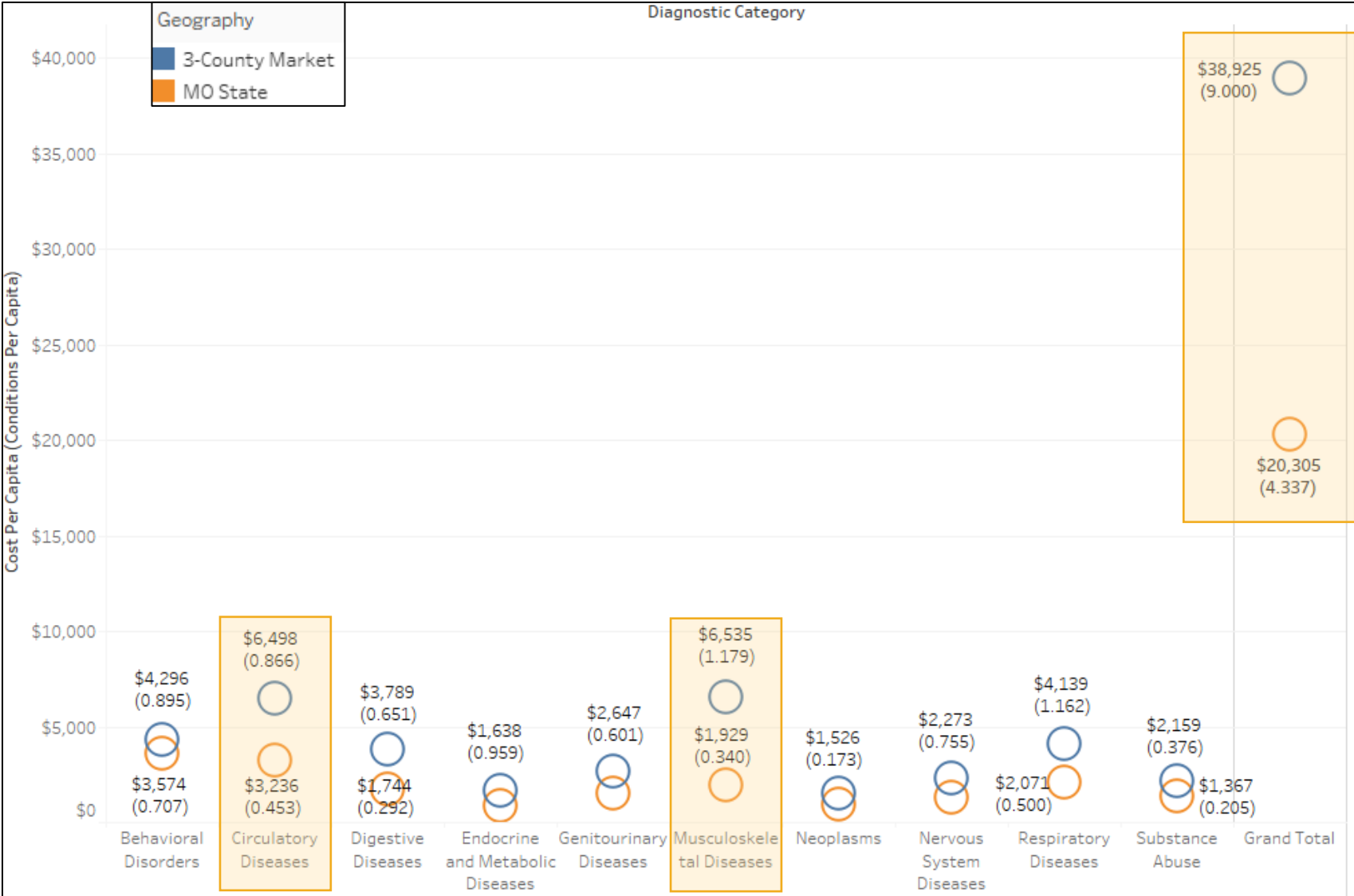
Key Takeaways
 When comparing the top 15 diagnosis subcategories for chronic conditions by estimated annual treatment cost, the largest categories in the 3-county market area with significant differential vs. the state average are for hypertension, spondylopathies, coronary atherosclerosis, and osteoarthritis. For example, the average annual cost per capita to treat hypertension is \$1,175 for the 3-county market area vs \$625 for the state of MO.

Chronic Conditions – 2022 chronic conditions per capita by zip code map, hypertension, all payors



Key Takeaways
Hypertension chronic condition prevalence rates per capita are relatively higher in the 3-county market area than other regions in the state of MO.

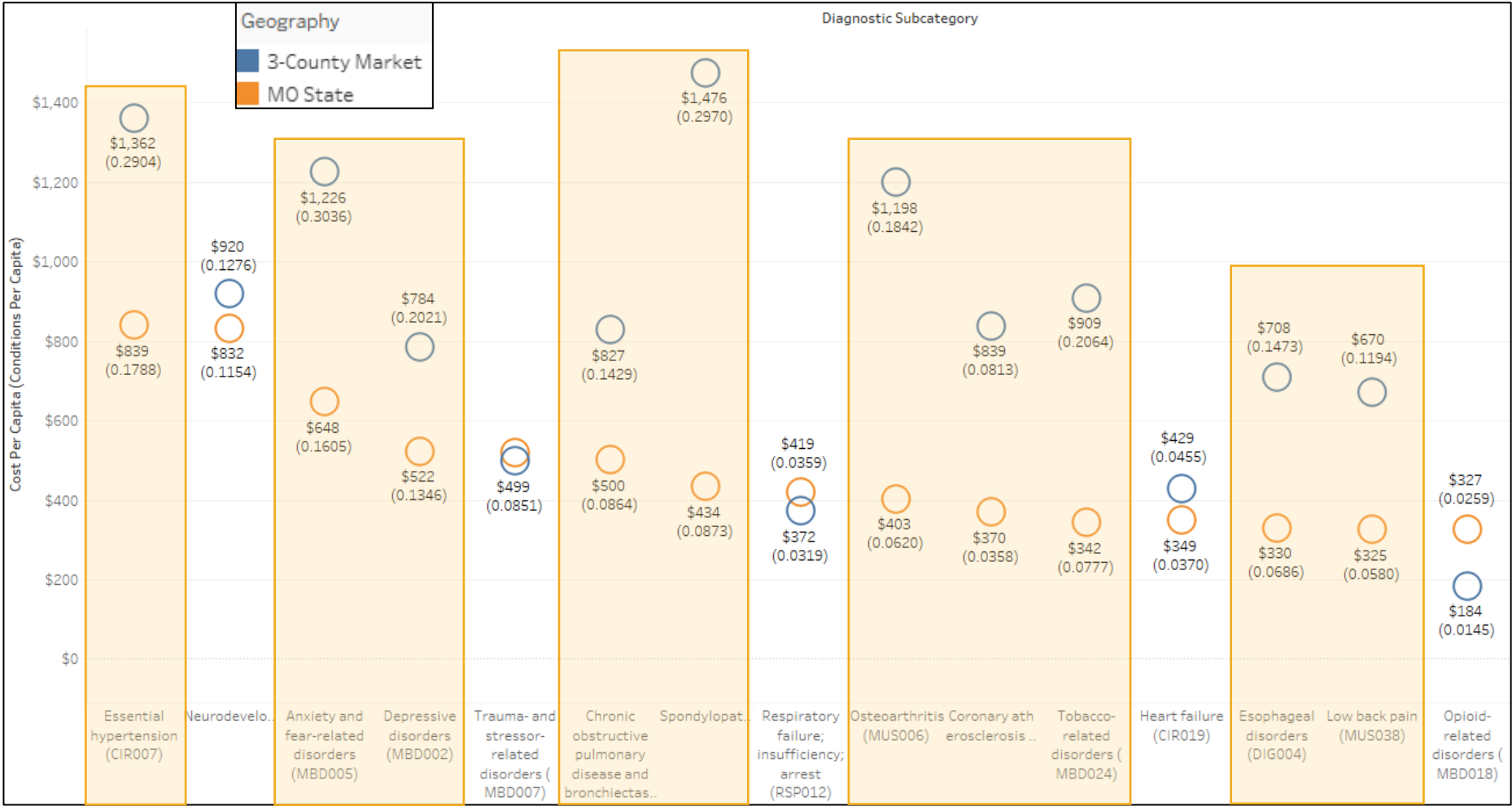
Chronic Conditions – 2022 per capita costs + chronic conditions per capita by diagnosis category, MO state vs. 3-county market, Medicaid



Key Takeaways

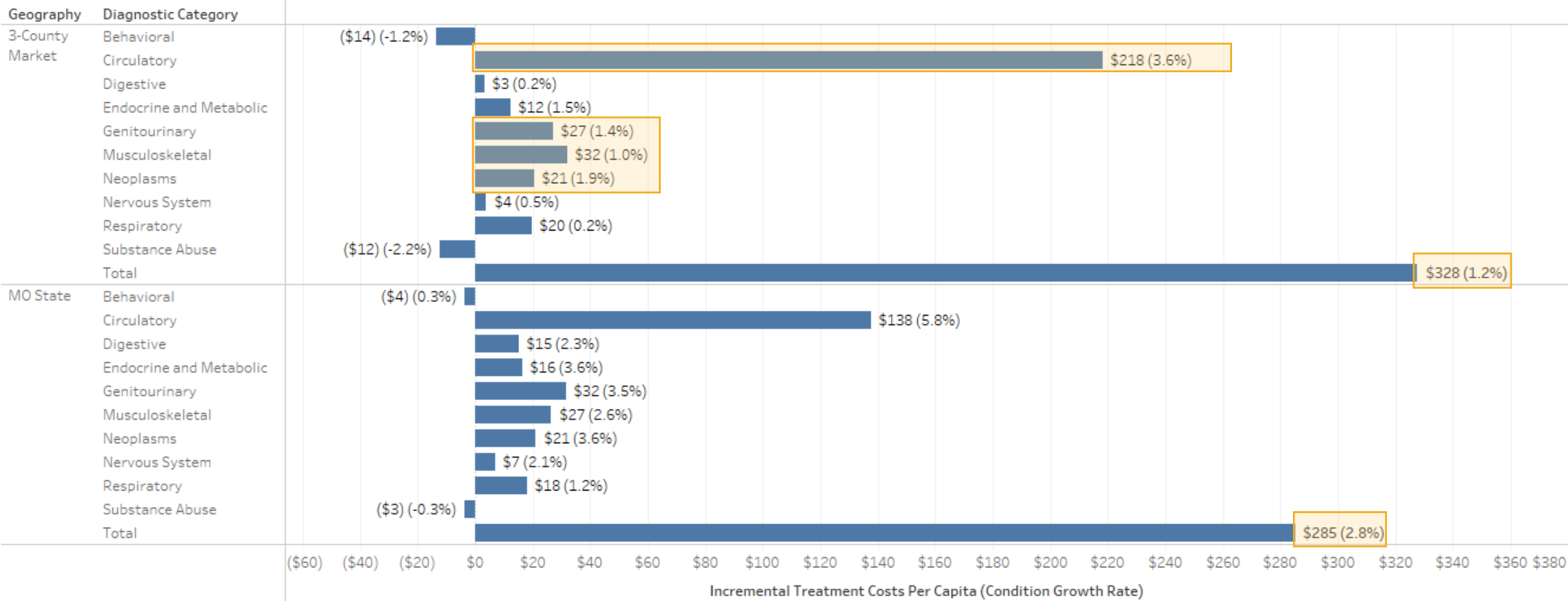
The per capita estimated annual Medicaid costs for the 3-county market are significantly higher than that of the state, due to a higher incidence rate of chronic conditions per Medicaid enrollee (9 conditions per enrollee for the 3-county market vs. 4.3 for the state). Among the chronic condition categories with the highest variance between the 3-county market area and the state are circulatory and musculoskeletal diseases followed by respiratory and digestive diseases.

Chronic Conditions – 2022 per capita costs + chronic conditions per capita by diagnosis subcategory, MO state vs. 3-county market, Medicaid (top 15)



Key Takeaways
 Among the top 15 most costly diagnosis subcategories, those with the highest variation in estimated cost due to higher prevalence rates for Medicaid enrollees are hypertension, anxiety and fear-related disorders, depressive disorders, COPD, spondylopathies, osteoarthritis, coronary atherosclerosis, tobacco-related disorders, esophageal disorders, and low back pain.

Chronic Conditions – 2027 incremental cost per capita w/ growth rates by diagnosis category, 3-county market vs. MO state, all payors

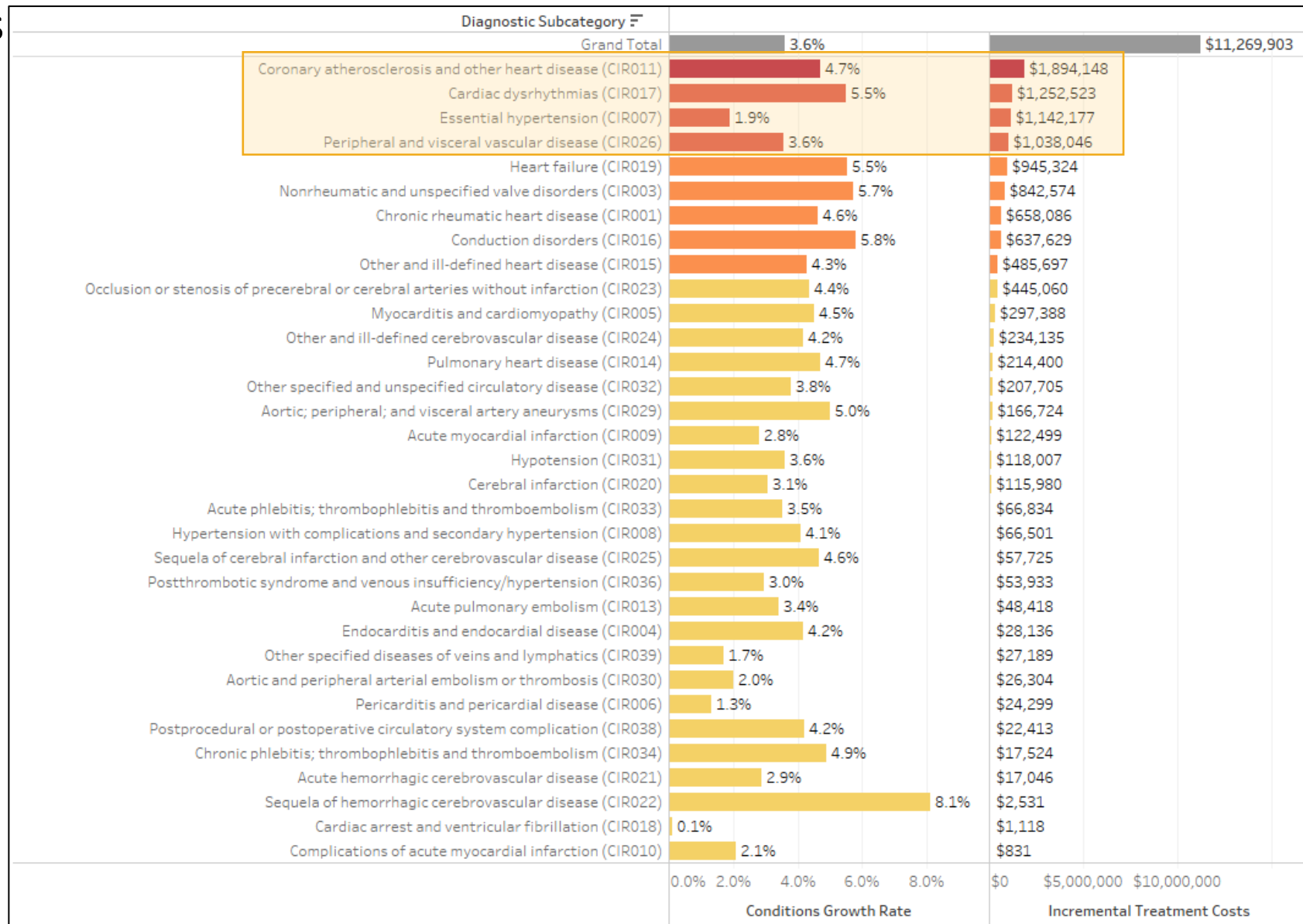
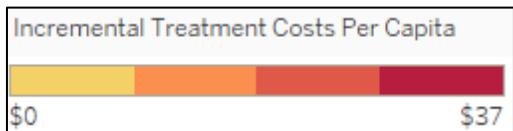


Key Takeaways

Circulatory diseases are projected to have the highest growth rates (3.6%) in 2027 and incremental annual cost per capita (+\$218) for the 3-county market area, with musculoskeletal, genitourinary, and neoplasms also contributing to a net increase in healthcare costs. Per-capita incremental annual healthcare costs are expected to be higher than the state (+\$328 vs. +\$285).

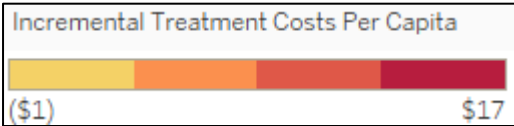
Chronic Conditions – 2027 incremental circulatory cost per capita w/ growth rates, 3-county market, all payors

Key Takeaways
 The top circulatory diseases contributing to an annual per capita cost increase in 2027 are atherosclerosis, cardiac dysrhythmias, hypertension and peripheral and visceral vascular disease. All circulatory diseases are expected to grow by 3.6% in 2027 resulting in an additional \$11.2M in annual healthcare costs for the 3-county market area.



Chronic Conditions – 2027 incremental musculoskeletal cost per capita w/ growth rates, 3-county market, all payors

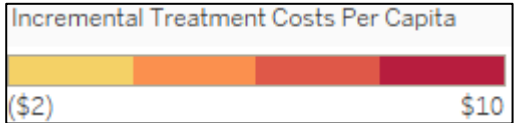
Key Takeaways
 Treatment for arthritis will contribute to most of the incremental annual healthcare costs for musculoskeletal-related diseases in the 3-county market area in 2027. Total estimated incremental healthcare costs associated with musculoskeletal conditions is expected to exceed \$1.6M.



Diagnostic Subcategory	Conditions Growth Rate	Incremental Treatment Costs
Grand Total	1.0%	\$1,647,119
Osteoarthritis (MUS006)	2.0%	\$899,526
Other specified bone disease and musculoskeletal deformities (MUS028)	2.3%	\$263,713
Spondylopathies/spondyloarthropathy (including infective) (MUS011)	0.5%	\$165,269
Osteoporosis (MUS013)	4.5%	\$135,197
Other specified joint disorders (MUS007)	0.3%	\$51,797
Scoliosis and other postural dorsopathic deformities (MUS022)	0.9%	\$46,044
Gout (MUS033)	2.6%	\$35,249
Osteomyelitis (MUS002)	2.3%	\$31,908
Crystal arthropathies (excluding gout) (MUS034)	4.0%	\$17,731
Systemic lupus erythematosus and connective tissue disorders (MUS024)	2.5%	\$15,552
Rheumatoid arthritis and related disease (MUS003)	0.7%	\$10,883
Acquired foot deformities (MUS021)	0.1%	\$7,895
Acquired deformities (excluding foot) (MUS023)	0.3%	\$7,686
Aseptic necrosis and osteonecrosis (MUS030)	1.2%	\$6,255
Osteomalacia (MUS035)	24.0%	\$877
Immune-mediated/reactive arthropathies (MUS008)	-0.2%	(\$101)
Autoinflammatory syndromes (MUS036)	-2.4%	(\$267)
Traumatic arthropathy (MUS031)	-0.7%	(\$617)
Juvenile arthritis (MUS004)	-2.5%	(\$855)
Neurogenic/neuropathic arthropathy (MUS032)	-1.7%	(\$2,216)
Postprocedural or postoperative musculoskeletal system complication (MUS037)	-0.2%	(\$2,829)
Low back pain (MUS038)	-0.1%	(\$11,838)
Other specified connective tissue disease (MUS025)	-0.1%	(\$29,741)

Chronic Conditions – 2027 incremental genitourinary cost per capita w/ growth rates, 3-county market, all payors

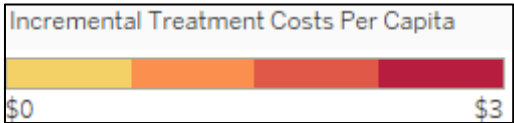
Key Takeaways
 Chronic kidney disease and renal failure are among the top diagnosis subcategories contributing to an increase in growth rates and incremental annual healthcare costs by 2027 for the 3-county market area. Total estimated incremental healthcare costs associated with genitourinary conditions is expected to exceed \$1.4M.



Diagnostic Subcategory	Conditions Growth Rate	Incremental Treatment Costs
Grand Total	1.4%	\$1,408,133
Chronic kidney disease (GEN003)	5.1%	\$530,364
Hyperplasia of prostate (GEN012)	5.1%	\$287,344
Other specified and unspecified diseases of kidney and ureters (GEN006)	3.0%	\$270,652
Acute and unspecified renal failure (GEN002)	5.0%	\$255,004
Urinary tract infections (GEN004)	1.3%	\$130,338
Urinary incontinence (GEN008)	3.2%	\$119,754
Other specified and unspecified diseases of bladder and urethra (GEN007)	2.2%	\$92,572
Hematuria (GEN009)	1.3%	\$45,252
Proteinuria (GEN010)	2.1%	\$12,613
Prolapse of female genital organs (GEN020)	1.2%	\$8,807
Postprocedural or postoperative genitourinary system complication (GEN026)	3.4%	\$7,957
Nephritis; nephrosis; renal sclerosis (GEN001)	2.4%	\$7,031
Erectile dysfunction (GEN014)	0.3%	\$4,392
Inflammatory conditions of male genital organs (GEN013)	-0.8%	(\$6,272)
Female infertility (GEN024)	-11.7%	(\$6,594)
Endometriosis (GEN019)	-3.4%	(\$15,466)
Other specified male genital disorders (GEN016)	-1.0%	(\$16,350)
Benign ovarian cyst (GEN022)	-2.5%	(\$19,286)
Menopausal disorders (GEN023)	-1.7%	(\$24,943)
Inflammatory diseases of female pelvic organs (GEN018)	-2.7%	(\$25,253)
Nonmalignant breast conditions (GEN017)	-1.1%	(\$26,571)
Other specified female genital disorders (GEN025)	-3.4%	(\$107,585)
Menstrual disorders (GEN021)	-4.7%	(\$115,627)

Chronic Conditions – 2027 incremental neoplasm cost per capita w/ growth rates, 3-county market (top 20 cancers), all payors

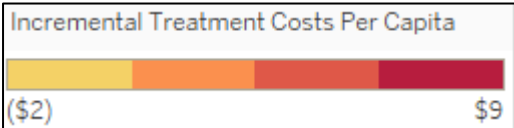
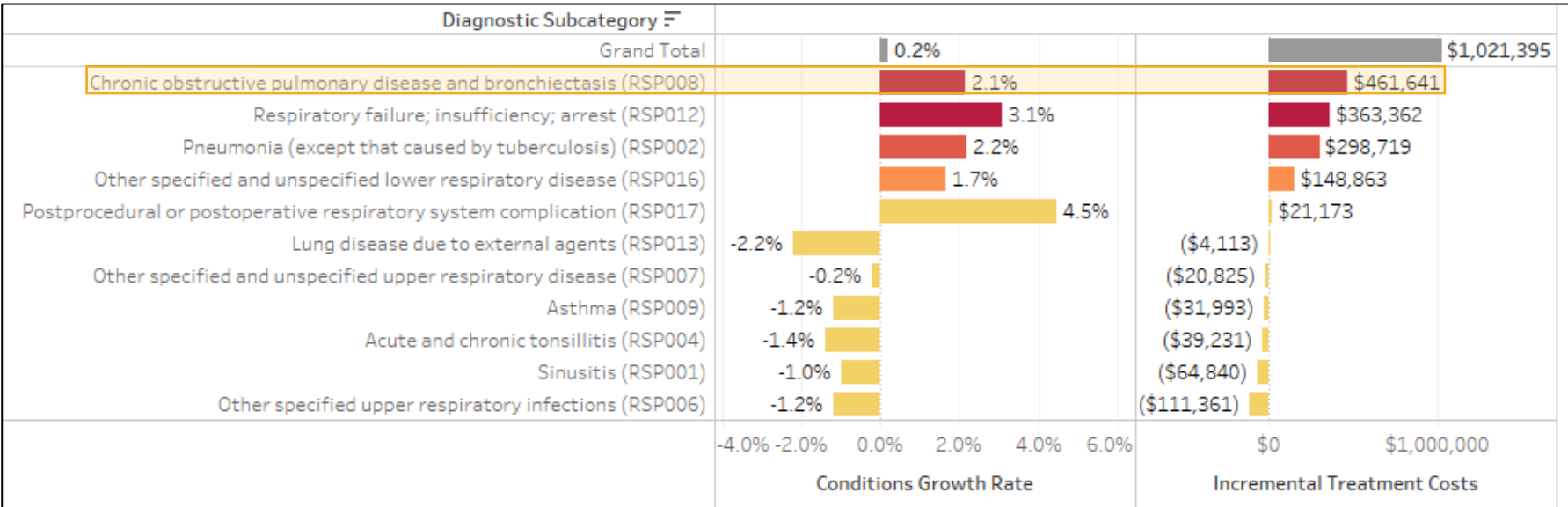
Key Takeaways
 Respiratory and male reproductive cancers are expected to have the highest incremental costs among neoplasm diagnoses in 2027 for the 3-county market area. Total estimated incremental healthcare costs associated with oncology conditions is expected to be over \$1M.



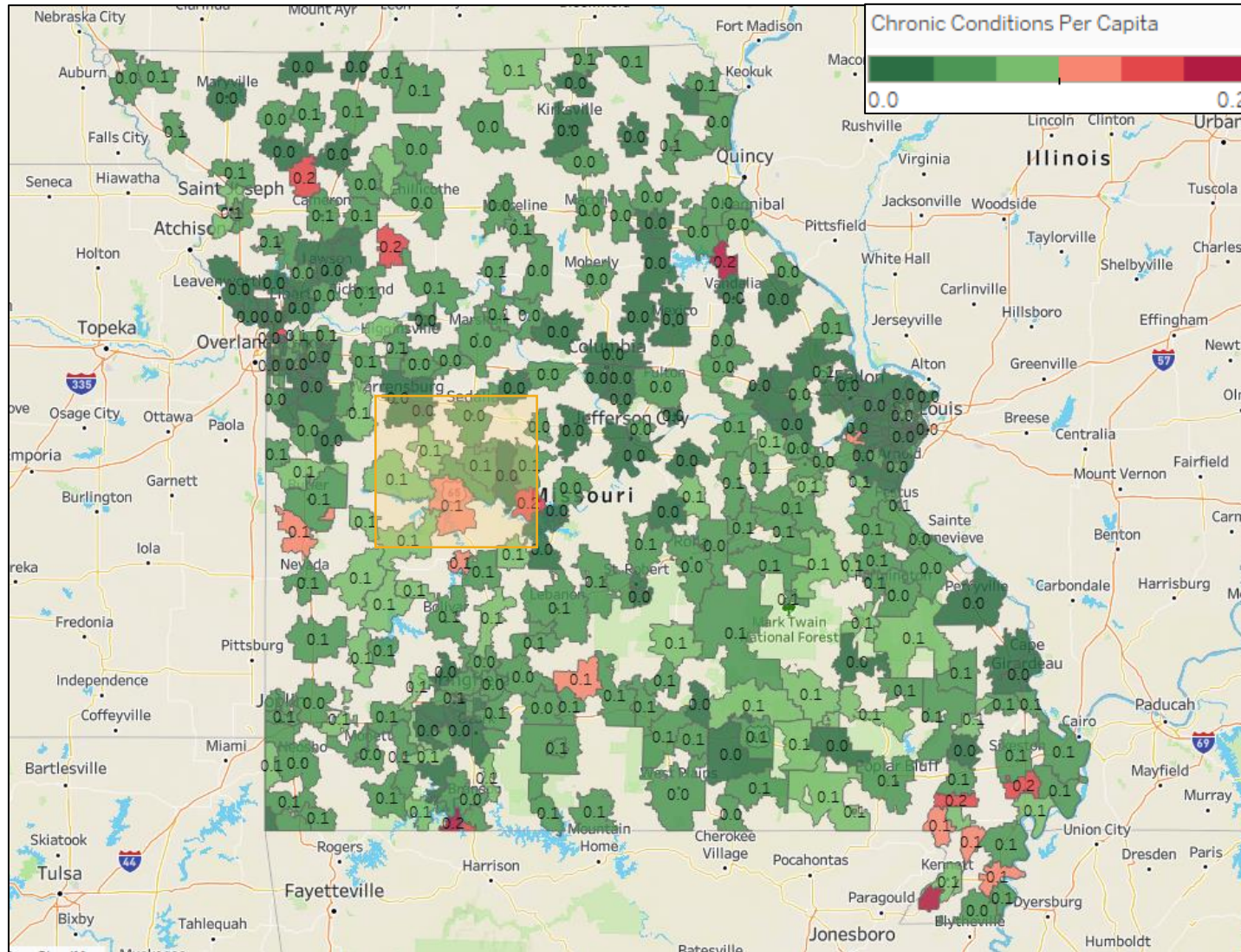
Diagnostic Subcategory	Conditions Growth Rate	Incremental Treatment Costs
Grand Total	1.9%	\$1,057,680
Respiratory cancers (NEO022)	4.5%	\$150,645
Male reproductive system cancers - prostate (NEO039)	5.7%	\$138,554
Neoplasms of unspecified nature or uncertain behavior (NEO072)	2.2%	\$134,539
Secondary malignancies (NEO070)	3.1%	\$102,975
Urinary system cancers - bladder (NEO043)	6.7%	\$67,029
Non-Hodgkin lymphoma (NEO058)	4.4%	\$59,896
Leukemia - chronic lymphocytic leukemia (CLL) (NEO061)	7.2%	\$59,269
Breast cancer - all other types (NEO030)	1.9%	\$58,516
Gastrointestinal cancers - colorectal (NEO015)	3.0%	\$56,606
Leukemia - all other types (NEO064)	6.2%	\$51,994
Conditions due to neoplasm or the treatment of neoplasm (NEO074)	2.6%	\$33,765
Gastrointestinal cancers - esophagus (NEO012)	5.2%	\$29,477
Multiple myeloma (NEO065)	3.4%	\$28,039
Malignant neuroendocrine tumors (NEO066)	7.4%	\$20,718
Skin cancers - all other types (NEO028)	4.8%	\$20,275
Gastrointestinal cancers - all other types (NEO021)	7.1%	\$18,659
Urinary system cancers - kidney (NEO045)	3.0%	\$17,820
Endocrine system cancers - pancreas (NEO051)	5.1%	\$16,972
Leukemia - acute myeloid leukemia (AML) (NEO060)	10.1%	\$12,372
Gastrointestinal cancers - stomach (NEO013)	4.6%	\$11,029

Chronic Conditions – 2027 incremental respiratory cost per capita w/ growth rates, 3-county market, all payors

Key Takeaways
 COPD is expected to carry the heaviest incremental cost burden in 2027 among respiratory-related conditions. Total estimated incremental healthcare costs associated with respiratory conditions is expected to be over \$1M in 2027 in the 3-county market area.



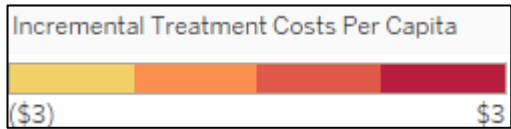
Chronic Conditions – 2022 chronic conditions per capita by zip code map, COPD, all payors



Key Takeaways
COPD chronic condition prevalence rates per capita are fragmented throughout the state of MO.

Chronic Conditions – 2027 incremental nervous system cost per capita w/ growth rates, 3-county market, all payors

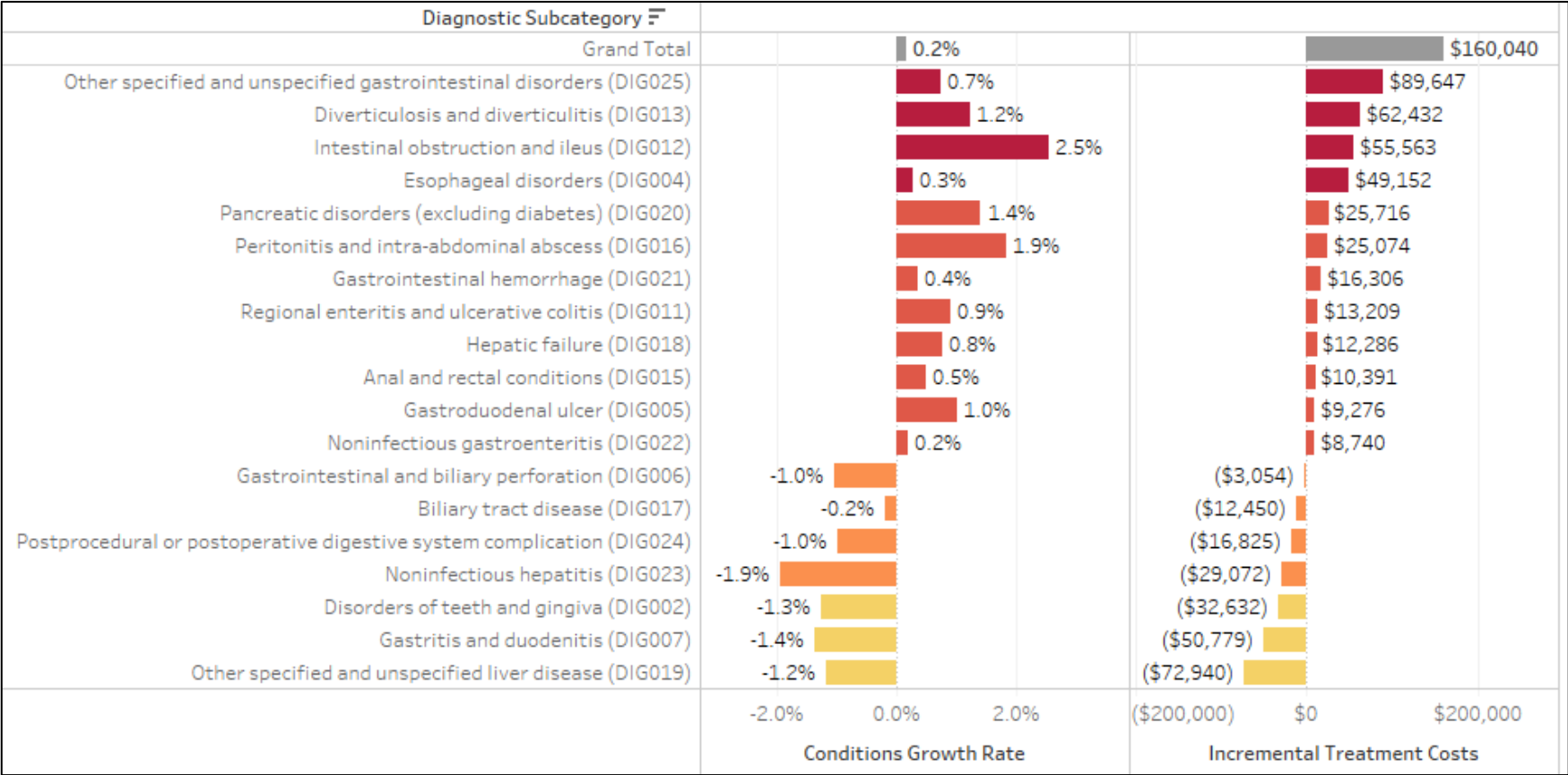
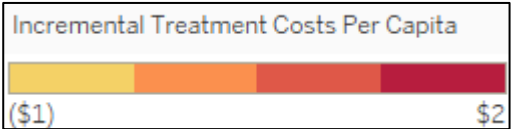
Key Takeaways
 Neurocognitive disorders are expected to grow by 6.5% in 2027 and are forecasted to make up most of the \$201K in incremental healthcare costs for nervous system disorders in the 3-county market area.



Diagnostic Subcategory	Conditions Growth Rate	Incremental Treatment Costs
Grand Total	0.5%	\$201,077
Neurocognitive disorders (NVS011)	6.5%	\$173,329
Parkinson's disease (NVS004)	7.7%	\$40,010
Transient cerebral ischemia (NVS012)	3.4%	\$25,861
Polyneuropathies (NVS015)	1.1%	\$25,818
Epilepsy; convulsions (NVS009)	0.7%	\$24,646
Sleep wake disorders (NVS016)	0.2%	\$20,675
Cerebral palsy (NVS007)	2.8%	\$12,596
Paralysis (other than cerebral palsy) (NVS008)	1.0%	\$6,299
Encephalitis (NVS002)	3.8%	\$5,706
Nervous system pain and pain syndromes (NVS019)	0.1%	\$4,689
Meningitis (NVS001)	11.8%	\$3,959
Myopathies (NVS018)	0.7%	\$1,421
Nerve and nerve root disorders (NVS017)	0.0%	\$701
Other specified CNS infection and poliomyelitis (NVS003)	3.8%	\$552
Coma; stupor; and brain damage (NVS013)	-0.1%	(\$1,597)
Multiple sclerosis (NVS005)	-0.8%	(\$3,868)
Headache; including migraine (NVS010)	-1.6%	(\$139,721)

Chronic Conditions – 2027 incremental digestive disorder cost per capita w/ growth rates, 3-county market, all payors

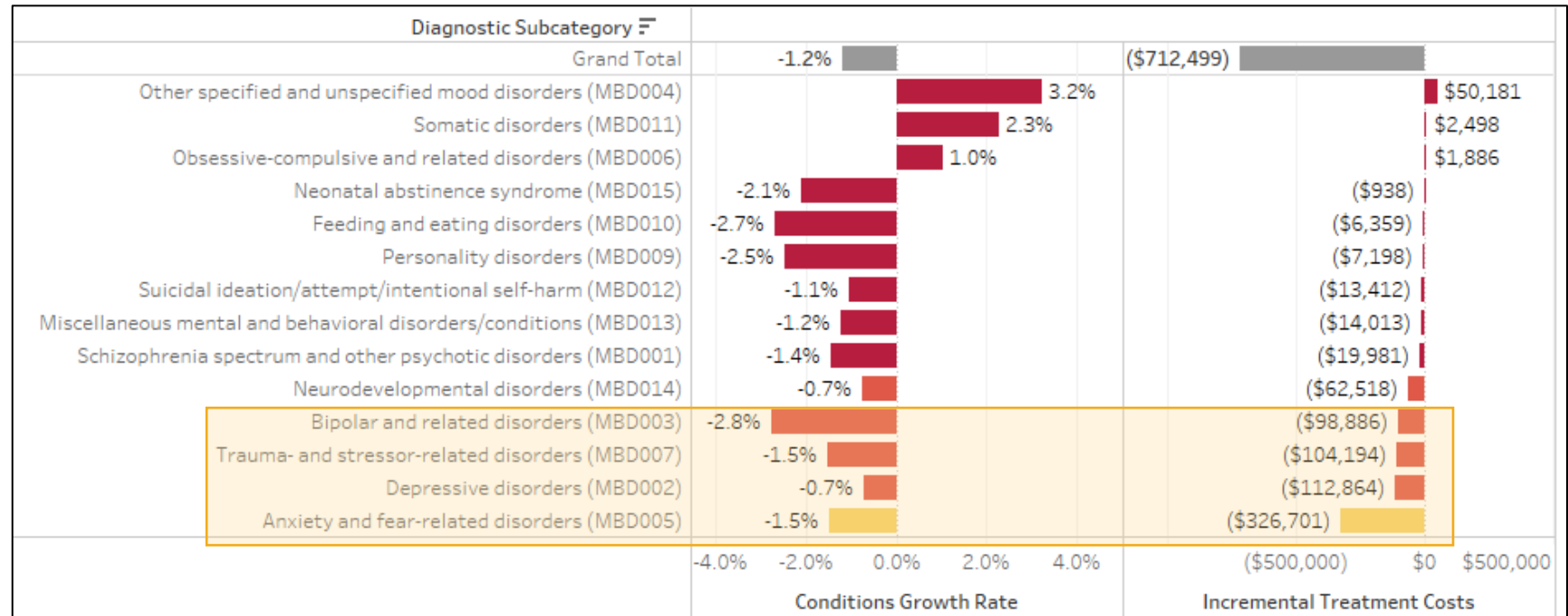
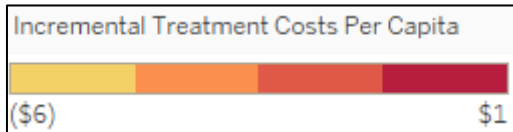
Key Takeaways
 Digestive disorders aren't expected to grow materially in 2027 in the 3-county market area (0.2% total growth for the category with an incremental \$160K estimated in annual healthcare costs).



Chronic Conditions – 2027 incremental behavioral health cost per capita w/ growth rates, 3-county market, all payors

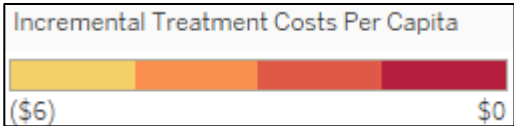
Key Takeaways

Annual costs related to behavioral health disorders are expected to decline by just over \$700K in 2027 in the 3-county market area, led by reductions in bipolar disorder, trauma and stressor-related disorder, depressive disorder and anxiety-related disorders.



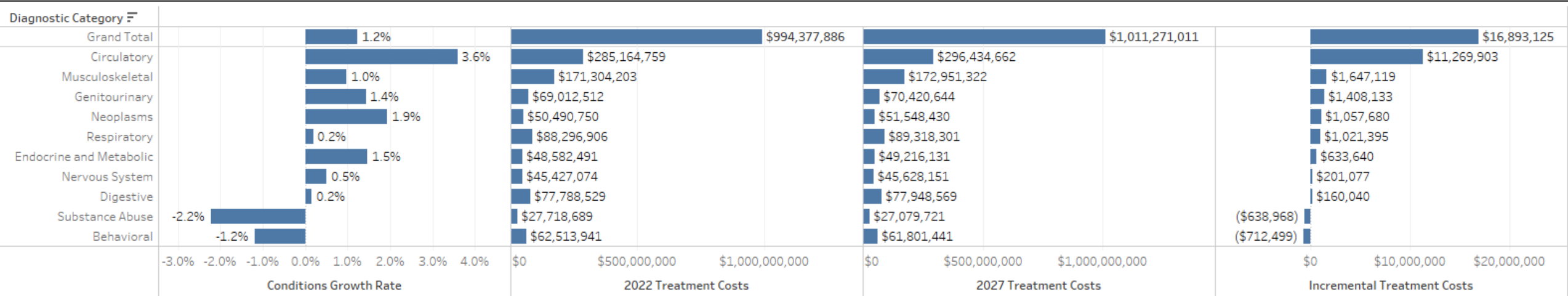
Chronic Conditions – 2027 incremental substance abuse cost per capita w/ growth rates, 3-county market, all payors

Key Takeaways
 Reductions in patients with substance abuse-related disorders are expected across all subcategories in 2027 for the 3-county market area.



Diagnostic Subcategory	Conditions Growth Rate	Incremental Treatment Costs
Grand Total	-2.2%	(\$638,968)
Hallucinogen-related disorders (MBD022)	-4.3%	(\$1,416)
Other specified substance-related disorders (MBD025)	-1.6%	(\$17,770)
Sedative-related disorders (MBD020)	-7.8%	(\$31,778)
Opioid-related disorders (MBD018)	-1.4%	(\$34,895)
Alcohol-related disorders (MBD017)	-1.3%	(\$35,521)
Stimulant-related disorders (MBD021)	-3.0%	(\$39,245)
Mental and substance use disorders in remission (MBD026)	-2.0%	(\$57,718)
Cannabis-related disorders (MBD019)	-5.3%	(\$134,346)
Tobacco-related disorders (MBD024)	-2.0%	(\$286,280)
		(\$500,000) \$0

Supplemental: Total estimated growth by diagnosis category with treatment costs 2022 vs. 2027, 3-county market, all payors





Summary of Key Takeaways

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- Henry, Benton, and St. Clair counties are expected to have a net decline in population in 2027, with significant shifts in age groups. Increases for ages 65+ Medicare populations and decreases in ages 45-64 commercial payer populations will result in additional financial burden for the market due to lower reimbursement rates. The estimated average household income for 2022 is 23% lower than the state average and 35% lower than the national average.
- The state-wide population is expected to grow less than the national average in 2027, and heavy-utilizing commercial payer healthcare populations ages 50-64 are expected to decline at a higher rate than the national average. Unlike the 3-county market area for GVMC, the race demographics for the state are more diverse, with moderate growth expected for black and mixed-race populations by 2027.
- 2022 chronic conditions per capita in the 3-county market area are significantly higher per zip code than for most other zip codes in the state of MO.
- For Henry, Benton and St. Clair counties, there were an estimated 4.3 chronic conditions per capita in 2022 vs. the statewide average of 2.4 resulting in a much higher estimated annual cost per capita of almost \$20K vs. the state average of approximately \$10.5K. Among the categories with the highest variance in prevalence and cost per capita are circulatory, musculoskeletal, and respiratory diseases.
- The per capita estimated annual Medicaid costs for the 3-county market are significantly higher than that of the state, due to a higher incidence rate of chronic conditions per Medicaid enrollee (9 conditions per enrollee for the 3-county market vs. 4.3 for the state). Among the chronic condition categories with the highest variance between the 3-county market area and the state are circulatory and musculoskeletal diseases followed by respiratory and digestive diseases.
- Among the top 15 most costly diagnosis subcategories, those with the highest variation in estimated cost due to higher prevalence rates for Medicaid enrollees are hypertension, anxiety and fear-related disorders, depressive disorders, COPD, spondylopathies, osteoarthritis, coronary atherosclerosis, tobacco-related disorders, esophageal disorders, and low back pain.
- When comparing the top 15 diagnosis subcategories for chronic conditions by estimated annual treatment cost, the largest categories in the 3-county market area with significant differential vs. the state average are for hypertension, spondylopathies, coronary atherosclerosis, and osteoarthritis. For example, the average annual cost per capita to treat hypertension is \$1,175 for the 3-county market area vs \$625 for the state of MO.

Summary of Key Takeaways

- Circulatory diseases are projected to have the highest growth rates (3.6%) in 2027 and incremental annual cost per capita (+\$218) for the 3-county market area, with musculoskeletal, genitourinary, and neoplasms also contributing to a net increase in healthcare costs. Per-capita incremental annual healthcare costs are expected to be higher than the state (+\$328 vs. +\$285).
- The top circulatory diseases contributing to an annual per capita cost increase in 2027 are atherosclerosis, cardiac dysrhythmias, hypertension and peripheral and visceral vascular disease. All circulatory diseases are expected to grow by 3.6% in 2027 resulting in an additional \$11.2M in annual healthcare costs for the 3-county market area.
- Treatment for arthritis will contribute to most of the incremental annual healthcare costs for musculoskeletal-related diseases in the 3-county market area in 2027. Total estimated incremental healthcare costs associated with musculoskeletal conditions is expected to exceed \$1.6M.
- Chronic kidney disease and renal failure are among the top diagnosis subcategories contributing to an increase in growth rates and incremental annual healthcare costs by 2027 for the 3-county market area. Total estimated incremental healthcare costs associated with genitourinary conditions is expected to exceed \$1.4M.
- Respiratory and male reproductive cancers are expected to have the highest incremental costs among neoplasm diagnoses in 2027 for the 3-county market area. Total estimated incremental healthcare costs associated with oncology conditions is expected to be over \$1M.
- COPD is expected to carry the heaviest incremental cost burden in 2027 among respiratory-related conditions. Total estimated incremental healthcare costs associated with respiratory conditions is expected to be over \$1M in 2027 in the 3-county market area.
- Neurocognitive disorders are expected to grow by 6.5% in 2027 and are forecasted to make up most of the \$201K in incremental healthcare costs for nervous system disorders in the 3-county market area.
- Digestive disorders aren't expected to grow materially in 2027 in the 3-county market area (0.2% total growth for the category with an incremental \$160K estimated in annual healthcare costs).
- Annual costs related to behavioral health disorders are expected to decline by just over \$700K in 2027 in the 3-county market area, led by reductions in bipolar disorder, trauma and stressor-related disorder, depressive disorder and anxiety-related disorders.
- Reductions in patients with substance abuse-related disorders are expected across all subcategories in 2027 for the 3-county market area.