



**Health of Health, 2023**  
**A Rios Partners report**



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### About Rios Partners

Founded in 2016, Rios Partners is a strategy consulting firm committed to delivering high-impact, high-value, and transformative results for our clients. We address our clients' most pressing and complex issues by developing a deep understanding of their needs, customers, employees, and partners to build timely and relevant solutions. As a team, we know what it takes to move organizations forward with measurable, sustainable results.

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## Executive Summary

While many people are having conversations about the state of the American health ecosystem, its challenges, and potential solutions, most of these conversations only focus on a single ecosystem component. Further, assessments of health and healthcare often fail to examine the critical role of mental health in overall well-being. Rios Partners' Health of Health report aims to provide a holistic assessment of the US health ecosystem. The 2023 edition takes advantage of trusted data sources to assess the state of US physical and mental health through four pillars:

- **Patients** – Representing the demand side of healthcare, this pillar includes metrics measuring the treatment individuals receive (or do not receive) and their associated health outcomes.
- **Providers** – Representing the supply side of healthcare, this pillar includes metrics measuring healthcare's human resources and physical infrastructure.
- **Payers** – Representing the funding structures of the healthcare system, this pillar includes metrics measuring the cost of healthcare and who pays for it.
- **R&D** – Representing innovations in healthcare, this pillar includes metrics measuring investment in new technologies and actions taken to improve healthcare delivery.

In addition to analyzing each pillar individually, the Health of Health report also assesses the interconnectedness of all pillars and draws Cross-Cutting Insights highlighting specific intersections, shortcomings, and opportunities in the American health ecosystem. This year's report highlights three insights:

**Insight 1, Rising Expenditures, Declining Results:** Access to care remains an issue for millions of uninsured or underinsured Americans. Additionally, many insured Americans struggle with the rising cost of healthcare. Combined, these issues often contribute to patients either delaying or forgoing treatment and result in patients experiencing more severe health conditions.<sup>1</sup> Even for Americans with sufficient healthcare coverage, ubiquitous disparities within the healthcare system result in worse outcomes for specific groups.<sup>2</sup> Further, the United States struggles to translate its strength in R&D into improved patient outcomes as innovations are not readily available to all. While healthcare access is a complex issue, improving it is essential to establishing a more effective and equitable health ecosystem in the United States.

**Insight 2, Meeting Mental Health Demand:** Mental health is a significant and growing challenge in the United States as self-reported rates of mental illness and suicide rates reached record highs in 2022.<sup>3</sup> While there was a similar uptick in the number of patients seeking mental health treatment, obtaining care remains a challenge.<sup>4</sup> Patients are often dissuaded from seeking help due to difficulties with identifying providers, the high cost of care, and/or stigma around mental illness and asking for help.<sup>5</sup> Increasing access to mental healthcare is critical for capturing the significant and wide-ranging benefits this care provides to individuals and the country.

**Insight 3, Looming Provider Shortages:** Increasing demand from an aging American population is outpacing growth in the supply of doctors and nurses. American medical schools are not on target to replace today's aging healthcare workforce, and significant shortages are forecasted.<sup>6</sup> The impact of provider shortages is observable in many rural areas, where patient outcomes trail those of urban centers where shortages are less pronounced.<sup>7</sup> A multifaceted solution that goes beyond just attracting and retaining more medical professionals is required to mitigate this issue and stop its spread. Approaches that transform care delivery from traditional models, utilize technology to reduce administrative burdens on providers, and leverage telemedicine to connect patients with specialists

have shown promise in recent years. Scaling them alongside further innovation is critical to solving projected provider shortages.

While the Health of Health report is not intended to detail or explain all the complexities within the American health ecosystem, its metrics, analysis, and insights aim to spur conversations that lead to change. The goal is for these changes to positively impact the state of health in the United States.

## Endnotes

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- <sup>1</sup> U.S. Census Bureau, “Table H-01. Health Insurance Coverage Status and Type of Coverage by Selected Characteristics for All People: 2020,” Current Population Survey, 2021 Annual Social and Economic Supplement (CPS ASEC), accessed December 18, 2023, [https://www2.census.gov/programs-surveys/cps/tables/hi/2021/h\\_01.xlsx](https://www2.census.gov/programs-surveys/cps/tables/hi/2021/h_01.xlsx) via <https://www.census.gov/data/tables/time-series/demo/income-poverty/cps-hi/hi.2020.html#list-tab-1157843587>; U.S. Census Bureau, “Table HIC-4\_ACS. Health Insurance Coverage Status and Type of Coverage by State--All Persons: 2008 to 2022,” 2008 to 2022 American Community Surveys (ACS), accessed December 18, 2023, [https://www2.census.gov/programs-surveys/demo/tables/health-insurance/time-series/acs/hic04\\_acs.xlsx](https://www2.census.gov/programs-surveys/demo/tables/health-insurance/time-series/acs/hic04_acs.xlsx) via <https://www.census.gov/library/publications/2023/demo/p60-281.html>. This metric combines the inverse of respondents reporting “no doctor visits” from 2015-2018 (in other words, 100 minus the percentage of those reporting no visits) with those reporting “at least one doctor visit” from 2019-2022 as the survey in question was changed after 2018. These numbers are not directly comparable but paint a rough picture of those seeing a doctor at least once over the eight years in question. National Center for Health Statistics, “Percentage of having a doctor visit for any reason in the past 12 months for adults aged 18 and over, United States, 2019–2022,” National Health Interview Survey, accessed December 13, 2023, [https://www.n.cdc.gov/NHISDataQueryTool/SHS\\_adult/index.html](https://www.n.cdc.gov/NHISDataQueryTool/SHS_adult/index.html); National Center for Health Statistics, “Crude percentages of no doctor office visits for adults aged 18 and over, United States, 2015-2018,” National Health Interview Survey, accessed December 28, 2023, <https://www.cdc.gov/nchs/nhis/ADULTS/www/index.htm>.
- <sup>2</sup> Elizabeth Arias and Jiaquan Xu, “Provisional Life Expectancy Estimates for 2021,” *National Vital Statistics Reports* 71, no. 1 (August 8, 2022), Hyattsville, MD: National Center for Health Statistics, <https://dx.doi.org/10.15620/cdc:118055>, [https://www.cdc.gov/nchs/data/nvsr/nvsr58/nvsr58\\_10.pdf](https://www.cdc.gov/nchs/data/nvsr/nvsr58/nvsr58_10.pdf); Elizabeth Arias, Kenneth D. Kochanek, Jiaquan Xu, and Betzaida Tejada-Vera, “Provisional Life Expectancy Estimates for 2022,” *Vital Statistics Rapid Release* no. 31 (November 2023), Hyattsville, MD: National Center for Health Statistics, <https://dx.doi.org/10.15620/cdc:133703>, <https://www.cdc.gov/nchs/data/vsrr/vsrr031.pdf>. Donna L. Hoyert, “Maternal Mortality Rates in the United States, 2021,” Health E-Stats, National Center for Health Statistics, March 2023, <https://dx.doi.org/10.15620/cdc:124678>, <https://www.cdc.gov/nchs/data/hestat/maternal-mortality/2021/maternal-mortality-rates-2021.pdf>. Danielle M Ely and Anne K Driscoll, “Infant Mortality in the United States, 2021: Data From the Period Linked Birth/Infant Death File,” *National Vital Statistics Reports* 72, no. 11 (Hyattsville, MD: National Center for Health Statistics, September 12, 2023), <https://dx.doi.org/10.15620/cdc:131356>, <https://www.cdc.gov/nchs/data/nvsr/nvsr72/nvsr72-11.pdf>; Danielle M Ely and Anne K Driscoll, “Infant Mortality in the United States: Provisional Data From the 2022 Period Linked Birth/Infant Death File,” *Vital Statistics Rapid Release* no. 33 (Hyattsville, MD: National Center for Health Statistics, November 2023), <https://doi.org/10.15620/cdc:133699>, <https://www.cdc.gov/nchs/data/vsrr/vsrr033.pdf>. Emily E. Petersen, Nicole L. Davis, David Goodman, Shanna Cox, Carla Syverson, Kristi Seed, Carrie Shapiro-Mendoza, William M. Callaghan, and Wanda Barfield, “Racial/Ethnic Disparities in Pregnancy-Related Deaths — United States, 2007–2016,” Centers for Disease Control and Prevention, *Morbidity and Mortality Weekly Report* 68, no. 35 (September 2019): 762–765, <http://dx.doi.org/10.15585/mmwr.mm6835a3>, <https://www.cdc.gov/mmwr/volumes/68/wr/mm6835a3.htm>. Socioeconomic trends are not tracked yearly to the same extent as racial/ethnic demographics, but a similar phenomenon has been thoroughly documented in this area. For example, see Raj Chetty, Michael Stepner, Sarah Abraham, et al., “The Association Between Income and Life Expectancy in the United States, 2001-2014,” *JAMA* 315, no. 16 (April 26, 2016):1750–1766, doi:10.1001/jama.2016.4226, <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4866586/>.
- <sup>3</sup> Please note that data collection methodology changed in 2021 and SAMHSA does not recommend directly comparing results from 2021 or later with estimates from surveys in 2020 or before. Substance Abuse and Mental Health Services Administration, “National Survey on Drug Use and Health (NSDUH) National Releases,” 2022–2014, <https://www.samhsa.gov/data/nsduh/national-releases>.
- <sup>4</sup> Please note that data collection methodology changed in 2021 and SAMHSA does not recommend directly comparing results from 2021 or later with estimates from surveys in 2020 or before. Substance Abuse and Mental

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Health Services Administration, “National Survey on Drug Use and Health (NSDUH) National Releases,” 2022–2014, <https://www.samhsa.gov/data/nsduh/national-releases>.

<sup>5</sup> Bowman Family Foundation, *Equitable Access to Mental Health and Substance Use Care: An Urgent Need*, July 18, 2023, [https://www.filesbff.org/Survey\\_Conducted\\_by\\_NORC.pdf](https://www.filesbff.org/Survey_Conducted_by_NORC.pdf).

<sup>6</sup> Health Resources & Services Administration, “Workforce Projections,” accessed December 29, 2023, <https://data.hrsa.gov/topics/health-workforce/workforce-projections?hmpgdshbrd=1>.

<sup>7</sup> U.S. Government Accountability Office, “Health Care Capsule: Accessing Health Care in Rural America,” May 16, 2023, <https://www.gao.gov/products/gao-23-106651>. Health Resources & Services Administration, “Health Workforce Shortage Areas,” accessed December 29, 2023, <https://data.hrsa.gov/topics/health-workforce/shortage-areas>.