

Hospital Markets in Oklahoma *at a glance*

A snapshot of hospital market structure, concentration, and ownership across the state — and how they've changed since 2000. This analysis reflects data available through May 2026.

In Oklahoma, the number of monopoly hospitals rose from 18 in 2000 to 25 in 2026.

WHAT THIS ANALYSIS COVERS

This analysis focuses on the state's 108 general short-term acute care (GSAC) hospitals — the facilities where most privately insured, Medicare, and Medicaid patients receive inpatient care, and where market concentration most directly affects the prices employers and workers pay. Each hospital's market is defined via a 30-minute travel radius around that facility. Within it, we measure concentration using the Herfindahl-Hirschman Index (HHI) — a standard antitrust metric calculated as the sum of the squared market shares of the owners in a market. HHI ranges from 0 (many small hospitals, low concentration) to 10,000 (a monopoly market, which has a single owner). Our hospital-centric HHI is a consistent analytical proxy for market concentration, not a legally defined antitrust market.

● **GSAC Hospitals (108)** ● VA / Military ● Psychiatric / Behavioral ● Rehabilitation ● Children's Specialty

Market Concentration

Oklahoma's hospital markets have become more concentrated since 2000, with average hospital market HHI rising from 5,408 to 5,767, an increase of 359 points. Every hospital still operates in a market with an HHI above 1,800, the threshold the Federal Trade Commission (FTC) and Department of Justice (DOJ) consider “highly concentrated.” The number of monopoly hospitals rose from 18 in 2000 to 25 in 2026. Over the period, 23 hospitals closed and 20 opened, a net loss of 3 hospitals. Thirty-four transactions reshaped ownership. Twelve of those transactions (35%) qualified as “Red Zone” mergers. A Red Zone merger raises at least one merging hospital's market HHI by over 100 points to above 1,800, which DOJ and FTC guidelines presume is likely to raise prices.

2000 | 111 hospitals overall



2026 | 108 hospitals overall



CONCENTRATION SCALE (IN HHI)

● **Low** (<1,000 HHI) ● **Moderate** (1,000 to <1,800) ● **High** (1,800 to <5,000) ● **Higher** (5,000 to <10,000) ● **Monopoly** (10,000 HHI)

Explore the data yourself

Our tool has three components. **The Market Explorer** tracks how hospital market concentration has evolved from 2000 to May 2026, drawing on ownership data from the AHA's Annual Survey, validated against state health department filings, SEC disclosures, and public reporting. **The Closures Explorer** tracks hospital closures and openings nationwide, each year since 2000. **The Forecast Lab** uses that same data to model how a proposed merger, closure, or opening would reshape a hospital market as it stood in 2026 — it models the scenarios you specify and does not identify potential mergers.

Note on the data: The tool uses a first-of-its-kind database that we built from scratch. We have done our best to gather and validate the data; however, if you notice an error (e.g., a hospital's name, a merger year) or if you have questions about our methodology, please notify us at HealthCareAffordabilityLab@yale.edu.

Health Care
Affordability Lab
at Yale

Explore Market Concentration at
Markets.HealthCareAffordabilityLab.org



QR code to OK Hospitals

Hospital Markets in Oklahoma

October 2026

Key Stats

SYSTEM OWNERSHIP

50% → 50%

55/111 → 54/108 part of system

AVG HHI INCREASE

+359

5,408 → 5,767

RED ZONE TRANSACTIONS

12 of 34

35% in Red Zone

HOSPITALS LOST (NET)

-3

23 closed, 20 opened

System Ownership Remained Near Half

The share of Oklahoma hospitals owned by a multi-hospital system remained near 50% between 2000 and 2026, with the number of independent hospitals falling from 56 to 54 and the number of system-owned hospitals falling from 55 to 54. The largest systems are INTEGRIS Health (9 hospitals) and Mercy (8), followed by Ardent Health Services (7).

2000 | 111 hospitals overall

■ 55 in 13 systems □ 56 independents



2026 | 108 hospitals overall

■ 54 in 13 systems □ 54 independents

Oklahoma's Largest Systems

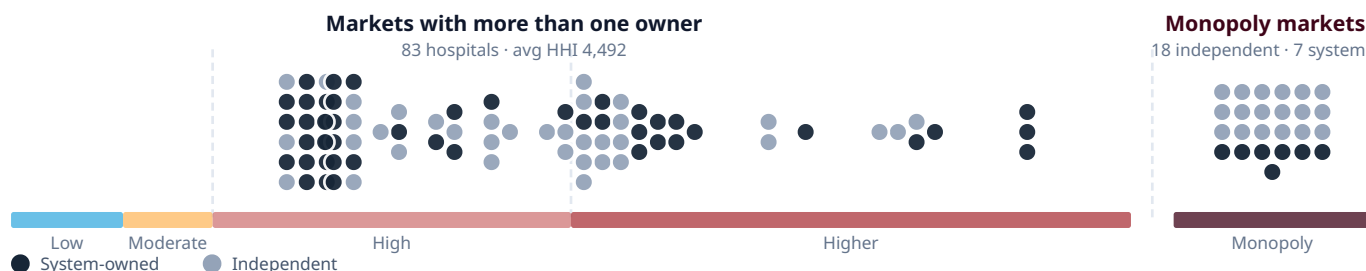
Thirteen systems own 54 of Oklahoma's 108 hospitals; INTEGRIS Health and Mercy lead.

SYSTEM	HOSPITALS IN STATE	AVERAGE MARKET HHI	HOSPITALS WITH CONCENTRATION ABOVE 1,800 HHI
INTEGRIS Health	9	4,744	9 of 9
Mercy	8	6,186	8 of 8
Ardent Health Services	7	4,313	7 of 7

Average market HHI reflects the mean HHI across each system's hospitals within the state. HHI is calculated within a 30-minute travel radius of each facility. National hospital data typically lags by one to two years for new openings and recent ownership changes, so figures for 2024–2026 are preliminary and may not yet reflect all recent activity.

Rising Market Concentration

The number of monopoly hospitals rose from 18 in 2000 to 25 in 2026. In 18 of the 25 monopoly markets, the hospital is independently owned but is the only hospital within a 30-minute drive. Oklahoma's concentration reflects, in part, the state's rural geography and far distances between hospitals.



Each dot is one of Oklahoma's 108 hospitals, placed by its 2026 market HHI. 18 of the 25 monopoly hospitals are independent, with no other hospital within a 30-minute drive.