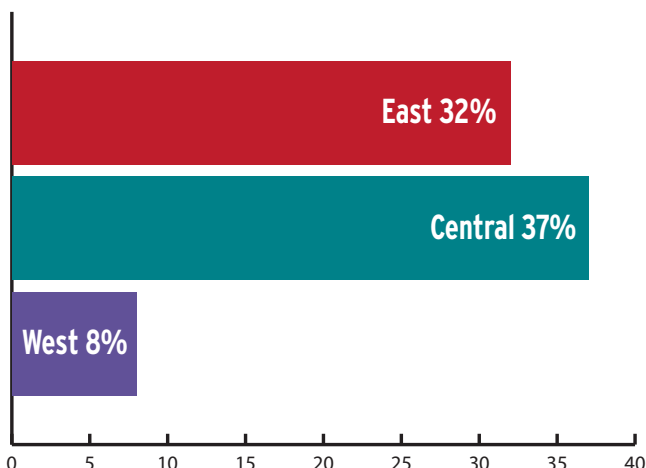


Recession? Hospital Revenue Rose in '09

EAST BEATS WEST

Hospitals in the West are least likely to have on-demand room service for patients, according to our census. Percent of hospitals offering such service, by region:



BUDGET CRUNCHING

56% of hospitals in our census expect their food purchases to increase during the next fiscal year, while 12% expect a decrease and 32% expect their food budget to remain the same. The breakdown of self-op versus contract:



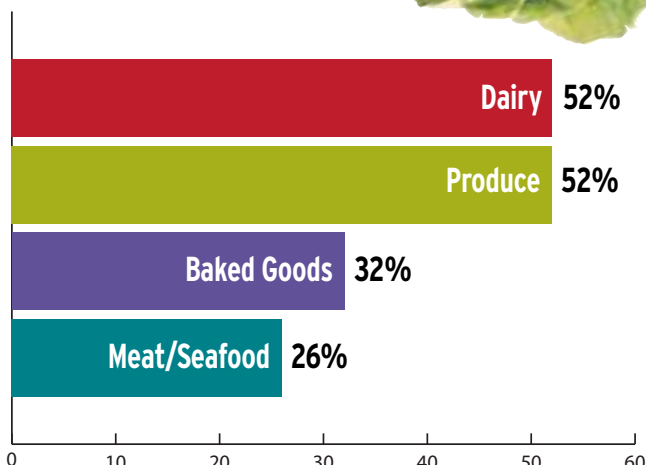
INCREASE:
Self-op: **50%**
Contract: **71%**

DECREASE:
Self-op: **17%**
Contract: **0%**

REMAIN THE SAME:
Self-op: **33%**
Contract: **29%**

BUYING LOCAL

Virtually all the hospitals in our census source at least some products locally. What they source:



HOSPITAL CENSUS HIGHLIGHTS

- Total foodservice revenues rose an average of **6%** last year, to **\$1.44 million** compared with 2008's \$1.36 million
- **73%** of the hospitals in our census manage their own foodservice departments.
- On average, hospitals reported **85,000** total patient days in 2009.
- **57%** of hospital foodservice revenue in 2009 came from non-patient meals, with a mean revenue of **\$1.27 million** and an average of **1,270** cash transactions per day.
- **56%** of operators expect their food purchases to increase next year. **71%** of contracted foodservices expect their food purchases to increase. The mean increase is projected to be **3.25%**.
- On average, hospitals had **55 FTEs** in their foodservice operations.
- Only **28%** of hospitals offer an on-demand room service program for patients. In last year's census, when hospitals were asked simply if they offered room service, **56%** said yes. Among hospitals that do offer on-demand room service, **86%** said it was available to patients in all units.
- **52%** of hospitals offer some form of cashless payment system for employee meals.
- **72%** of hospitals participate in a group purchasing organization for some or all of their food purchases, but only **57%** of hospitals with contracted foodservice do.

PERFORMANCE REPORT FOR HOSPITAL FOODSERVICE

HOSPITAL (location)	2009 Food Purchases	% Change in Food Purchases 2009 vs. 2008	Est. % Change in Food Purchases 2010 vs. 2009	% Revenue From Patient Meals	% Revenue From Non-Patient Meals	2009 Patient Days
ANNUAL PURCHASES MORE THAN \$1 MILLION						
Continuum Health Partners (New York City)	\$8,706,590	3%	3%	60%	40%	609,260
Lakeland Regional Medical Center (Lakeland, Fla.)	\$8,200,000	0%	3%	0%	100%	219,000
Miami Valley Hospital (Dayton, Ohio)	\$6,500,000	2%	0%	22%	78%	na
NYU Health Network (New York City)	\$6,000,000	20%	4%	25%	75%	76,915
St. Francis Hospital (Indianapolis) SOD	\$4,200,000	40%	2%	0%	100%	130,000
Laguna Honda Hospital (San Francisco)	\$3,100,000	0%	2%	0%	100%	310,250
ANNUAL PURCHASES \$300,000 - \$1 MILLION						
Central Alabama Health Center (Montgomery, Ala.)	\$900,000	5%	0%	100%	0%	142,400
North Fulton Regional Hospital (Roswell, Ga.) MOR	\$850,000	-11%	0%	75%	25%	43,070
Marion General Hospital (Marion, Ind.) MOR	\$800,000	1%	0%	40%	60%	18,980
Pacific Hospital of Long Beach (Long Beach, Calif.) ARA	\$728,000	0%	0%	30%	70%	40,150
Beloit Memorial (Beloit, Wis.)	\$700,000	8%	0%	30%	70%	22,265
Raleigh Community Hospital (Raleigh, N.C.) ARA	\$624,000	18%	3%	25%	75%	36,000
ANNUAL PURCHASES \$100,000 - \$299,999						
Florida Hospital - Lake Placid (Lake Placid, Fla.) SOD	\$250,000	11%	4%	40%	60%	9,125
Green County General Hospital (Linton, Mich.)	\$250,000	17%	0%	25%	75%	4,280
United General Hospital (Sedro-Woolley, Wash.)	\$250,000	11%	5%	40%	60%	6,600
Crawford Memorial Hospital (Robinson, Ill.)	\$240,425	6%	5%	50%	50%	4,748
Samaritan North Lincoln Hospital (Lincoln City, Ore.)	\$240,000	0%	0%	0%	100%	na
Kindred Hospital - Corpus Christi (Corpus Christi, Texas)	\$200,000	9%	2%	96%	4%	16,000
AVERAGE	\$1,438,540	6%	0.8%	42.7%	57.3%	84,961

LEGEND: ARA = ARAMARK; MOR = Morrison Health Care; SOD = Sodexo

To view the complete Performance Report click on Research then CENSUS REPORTS at:

FOODSERVICEDIRECTOR.COM

PERFORMANCE REPORT FOR HOSPITAL FOODSERVICE

HOSPITAL (location)	2009 Food Purchases	% Change in Food Purchases 2009 vs. 2008	Est. % Change in Food Purchases 2010 vs. 2009	% Revenue From Patient Meals	% Revenue From Non-Patient Meals	2009 Patient Days
Continuum Health Partners (New York City)	\$8,706,590	3%	3%	60%	40%	609,260
Lakeland Regional Medical Center (Lakeland, Fla.)	\$8,200,000	0%	3%	0%	100%	219,000
Miami Valley Hospital (Dayton, Ohio)	\$6,500,000	2%	0%	22%	78%	na
NYU Health Network (New York City)	\$6,000,000	20%	4%	25%	75%	76,915
St. Francis Hospital (Indianapolis) SOD	\$4,200,000	40%	2%	0%	100%	130,000
Laguna Honda Hospital (San Francisco)	\$3,100,000	0%	2%	0%	100%	310,250
Florida State Hospital (Chattahoochee, Fla.) MOR	\$3,000,000	47%	3%	93%	7%	na
Allegheny General Hospital (Pittsburgh)	\$2,600,000	-4%	-3%	50%	50%	53,000
University of Tennessee Medical Center (Knoxville, Tenn.) MOR	\$2,600,000	8%	1%	12%	88%	136,000
CAMC Memorial Hospital (Charleston, W.Va.) MOR	\$2,550,000	2%	2%	45%	55%	106,325
MeritCare Hospital (Fargo, N.D.)	\$2,500,000	0%	3%	30%	70%	114,000
Deconess Hospital (Evansville, Ind.)	\$2,300,000	6%	4%	50%	50%	165,000
Western Baptist Hospital (Paducah, Ky.) MOR	\$1,800,000	13%	3%	40%	60%	82,761
Providence St. Peter Hospital (Olympia, Wash.)	\$1,700,000	-15%	0%	0%	100%	88,018
Baylor Medical Center (Irving, Texas) ARA	\$1,600,000	-14%	4%	40%	60%	52,000
Bethesda Memorial Hospital (Boynton Beach, Fla.)	\$1,500,000	0%	3%	42%	58%	102,000
St. Joseph's Medical Center (Reading, Pa.) SOD	\$1,200,000	8%	5%	50%	50%	122,000
Central Alabama Health Center (Montgomery, Ala.)	\$900,000	5%	0%	100%	0%	142,400
North Fulton Regional Hospital (Rosewell, Ga.) MOR	\$850,000	-11%	0%	75%	25%	43,070
Marion General Hospital (Marion, Ind.) MOR	\$800,000	1%	0%	40%	60%	18,980
Pacific Hospital of Long Beach (Long Beach, Calif.) ARA	\$728,000	0%	0%	30%	70%	40,150
Beloit Memorial (Beloit, Wis.)	\$700,000	8%	0%	30%	70%	22,265
Raleigh Community Hospital (Raleigh, N.C.) ARA	\$624,000	18%	3%	25%	75%	36,000
Charles Cole Memorial Hospital (Coudersport, Pa.)	\$600,000	0%	0%	40%	60%	280,000
Veteran's Affairs Medical Center (Lebanon, Pa.) USFS	\$500,000	0%	0%	100%	0%	93,075
South County Hospital (Wakefield, R.I.) SOD	\$480,000	3%	3%	0%	100%	20,075
Laurel Heights Hospital (Atlanta)	\$425,000	2%	0%	0%	100%	38,487
Louisiana Medical and Heart Hospital (LaCombe, La.)	\$400,000	0%	-6%	0%	100%	10,950
Grinnell Regional Medical Center (Grinnell, Iowa)	\$350,000	-4%	2%	20%	80%	34,500
Heart South Rehabilitation (Tucson, Ariz.)	\$350,000	0%	-20%	99%	1%	na
Oak Lawn Hospital (Marshall, Mich.)	\$350,000	0%	3%	55%	45%	13,200
Outer Banks Hospital (Nags Head, N.C.)	\$330,000	10%	7%	0%	100%	na
Highland Cashiers (Highland, N.C.)	\$312,000	5%	3%	50%	50%	na
Kindred Hospital North Florida (Green Cove Springs, Fla.)	\$300,000	5%	0%	40%	60%	19,819
Florida Hospital - Lake Placid (Lake Placid, Fla.) SOD	\$250,000	11%	4%	40%	60%	9,125
Green County General Hospital (Linton, Mich.)	\$250,000	17%	0%	25%	75%	4,280
United General Hospital (Sedro-Woolley, Wash.)	\$250,000	11%	5%	40%	60%	6,600
Crawford Memorial Hospital (Robinson, Ill.)	\$240,425	6%	5%	50%	50%	4,748
Samaritan North Lincoln Hospital (Lincoln City, Ore.)	\$240,000	0%	0%	0%	100%	na
Kindred Hospital - Corpus Christi (Corpus Christi, Texas)	\$200,000	9%	2%	96%	4%	16,000
Rice Medical Center (Houston)	\$200,000	0%	-8%	5%	95%	na
South Central Kansas Regional Hospital (Arkansas City, Kan.)	\$200,000	0%	4%	0%	100%	89,000
Veteran's Administration Medical Center (Beckley, W.Va.)	\$175,000	0%	0%	100%	0%	na
Tomah Memorial Hospital (Tomah, Wis.)	\$156,000	4%	3%	75%	25%	5,110
Baptist Memorial Hospital (Covington, Tenn.) MOR	\$150,000	2%	0%	80%	20%	na
Kaiser Mental Health Center (Los Angeles)	\$120,000	10%	0%	78%	22%	18,250
La Hacienda Treatment Center (Hunt, Texas)	\$120,000	3%	3%	75%	25%	36,500
Stanley Regional Medical Center (Albermarle, N.C.)	\$120,000	-2%	-2%	50%	50%	23,125
Barton County Memorial Hospital (Lamar, Mo.)	\$100,000	0%	2%	100%	0%	6,205
Preston Memorial Hospital (Kingwood, W.Va.)	\$100,000	0%	-10%	60%	40%	na
TOTALS	\$71,927,015	6%	42%	2,137%	2,863%	3,398,443
Average	\$1,438,540	6%	0.8%	42.7%	57.3%	84,961

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