WarriorCentricHealth®

PREPARED FOR Hospital Council Northern & Central California

FINANCIAL OPPORTUNITY BRIEF: SOUTH BAY / MONTEREY COAST · 5-COUNTY REGION

Nearly 200,000 South Bay and Monterey Coast residents are military-connected. Most hospitals don't recognize them.

Here are the numbers in the five-county area:

76,683	122,693	199,376	6.7%
VETERANS	WARRIORS*	WARRIOR COMMUNITY**	% OF POPULATION

The market, county by county

County	Veterans	Warriors*	Warrior Community**	% of residents	Share of region
Santa Clara	40,798	65,277	106,075	5.5%	53.2%
San Luis Obispo	14,212	22,739	36,951	13.1%	18.5%
Monterey	12,035	19,256	31,291	7.2%	15.7%
Santa Cruz	6,806	10,890	17,696	6.7%	8.9%
San Benito	2,832	4,531	7,363	10.6%	3.7%
Region	**76,683**	**122,693**	**199,376**	**6.7%**	**100%**

*Includes Veterans, Active-Duty, Reserves, & Nat'l Guard. **Includes Warriors + Warrior family members.

Delivering warrior-conscious care to this large, underserved population also delivers ROI.

Becoming an Authorized Warrior Centric Health Facility™ gives HCNCC member systems the infrastructure to identify, engage, treat, and retain this population, delivering improved outcomes, regulatory compliance, and measurable growth in wallet share and new patients.

Sources: Census Reporter, ACS 2024 1-year county estimates; WCH planning multipliers.

THE FINANCIAL RETURN

Two channels of value for every participating system

Five-county reference scenario. WCH fees modeled as three deployments at $176,000 each per year.

CHANNEL 1

Increased wallet share

$4.3M

annual modeled uplift from 24,539 existing Warrior patients (20% provider share)

Value per existing Warrior	$175 / yr
Year 1 net after fees	$3.77M
Three-year net after fees	$11.3M
Return on WCH fees	713%

Drivers: referral retention, outpatient and specialty care, behavioral health, pharmacy.

Break-even: about 1,006 existing Warrior patients cover one $176K deployment.

CHANNEL 2

New patient acquisition

$27.6M

three-year contribution margin from 1,227 new Warriors a year (1% of the market).

Margin per new Warrior	$3,750/yr
Year 1 net after fees	$4.07M
Three-year net after fees	$26.0M
Return on WCH fees	1,643%

Retained cohorts compound each year



Request a facility- or system-specific financial assessment.

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