

February 2022:

HEALTH PLAN INDUSTRY

Market Intelligence Report



**National Trends
in Medicaid**

**2022 Predictions
for Payers**

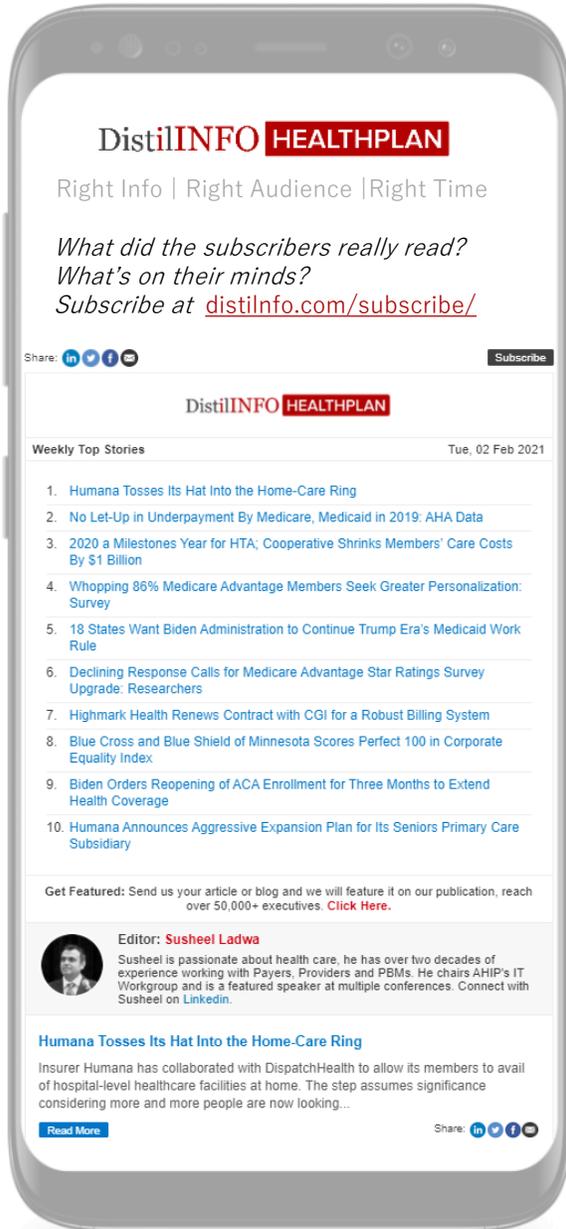
What Topics did **100,000+**
Subscribers of our Publications Read?

**Double Digit
Growth for
UHG**

**New Digital
Health Tools**

DistilINFO HEALTHPLAN





We studied and analyzed **reader interest** across Health Plan Industry for this report.

9,000+
CxO Level
Readers



13,000+
VP Level
Readers



1,800+
Health Plan Affiliated
Organizations

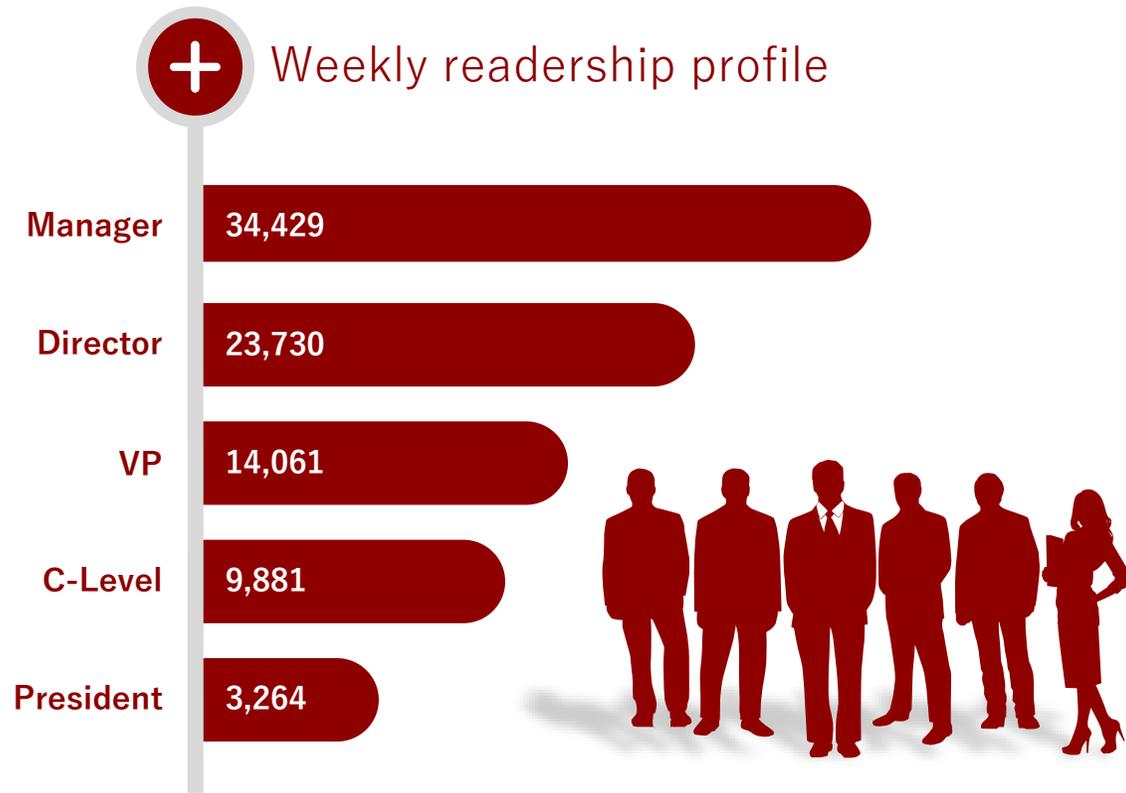


31,000+
Director Level
Readers



1. [Health insurers under ACA refund \\$2B to 2020 enrollees](#)
2. [CMS says YES! to California's Medicaid revamp](#)
3. [To bet or not to bet on Payers in 2022: An outlook](#)
4. [UnitedHealth Ends 2021 with a Note of Cheer](#)
5. [Aetna signs multiyear pact with DocGo to expand at-home care](#)
6. [Top 5 recent payer moves](#)
7. [ACA marketplace sign-ups hit record 14.5 million](#)
8. [Novant Health's new tools to aid patients in digital care](#)
9. [AHIP becomes a supportive member of Innovate Kidney Care](#)
10. [Centene to buy Magellan Health for \\$2.2 billion | Distilinfo Healthplan](#)

Here is what
CxO, VP, Director Level
health plan audience is interested in.



CxO, VP Level Audience

National Trends in Medicaid: An increased enrollment reflects changes in the US economy. How is the payer industry following the trend?

2022 Predictions for Payers: It is likely to be another challenging year for payers. What are the key factors industry leaders are expected to focus on?

Overall Business Audience

Double Digit Growth for UHG: With encouraging earnings through 2021, particularly in Q4, UHG has set the tone for a sparkling start of the year.

New Digital Health Tools: Payers continue to navigate the complex landscape of digital health tools as it attracts investment from large health systems.

National Trends in Medicaid



After declines in enrollment from 2017 through 2019, total Medicaid/CHIP enrollment grew to 83.2 million in June 2021, an increase of 12.0 million from enrollment in February 2020 (16.8%), right before the pandemic and when enrollment began to steadily increase.¹



The Centers for Medicare and Medicaid Services have approved California's overhaul of the nation's largest insurance program for low-income and disabled residents, officials said. This decision that among other things allows Medicaid money to be spent on housing-related services as the most populous state struggles with homelessness and a lack of affordable housing.²



Over 2 million individuals living in the 12 states that have not adopted the Affordable Care Act's (ACA) Medicaid expansion fall into the coverage gap because they do not qualify for Medicaid and have incomes below poverty, making them ineligible for premium subsidies in the ACA Marketplace.³

National Trends in Medicaid: Medicaid enrollment this season is at all-time high. The prevailing pandemic has played a vital role in how Americans now perceive health insurance.

1

[Analysis of Recent National Trends in Medicaid and CHIP Enrollment](#)



2

[CMS says YES! to California's Medicaid revamp](#)



3

[Medicaid: What to Watch in 2022](#)



2022 Predictions for Payers

2022 Predictions for Payers: Technological as well as economic challenges will shape the industry's outlook this year.



Blue Cross Blue Shield of Massachusetts saw a surge of visits driven by demand for mental healthcare, and the number of telehealth claims rose from 200 per day in February 2020 to 38,000 per day in May 2020. In a nine-week period, the health plan recorded more than 1 million telehealth visits.¹



To deliver the best possible member experience, you need the right technology behind it. It's impossible to enable the personalized, detail-oriented experience your members and potential members expect when you're swiveling from system to system, and none of them talk to one another.²



Among the top six health payers, Cigna and CVS Health are the two most promising players trading at a lower PE multiple of 9.49 and 18 times respectively. Centene, UnitedHealth and Humana are among the costliest stocks trading at the PE multiple of 68.54, 31 and 22 respectively. Anthem has a relatively modest PE multiple of 20.³

1

[2022 predictions for payers in the Healthcare industry](#)



2

[3 Health Insurance Technology Trends for 2022 and Beyond](#)



3

[To bet or not to bet on Payers in 2022: An outlook](#)



Double Digit Growth for UHG

Double Digit Growth for UHG: The group has reiterated MA growth expectations for 2022.

Revenues of \$287.6 Billion Grew 12% Year-Over-Year, with Double-Digit Growth at both Optum and UnitedHealthcare. Cash Flows from Operations were \$22.3 Billion or 1.3x Net Income. Full Year and Fourth Quarter Net Earnings were \$18.08 and \$4.26 Per Share.¹

The fastest growing segment was OptumHealth with 30% growth in revenue per consumers, which was driven by increasing numbers of our patients served under value-based arrangements. UnitedHealthcare saw full year revenues growing 11% to \$223 B. Operating margins, however, shrunk from 6.2% last year to 5.4%.²

Total people served by UnitedHealthcare grew by 2.2 million in 2021, led by continued strong growth in Medicare Advantage and Dual Special Needs Plans and expansion in the broader Medicaid market. Including Dual Special Needs Plans, Medicare Advantage membership grew to serve more than 900,000 additional people in 2021 with strong gains in both individual and group offerings.³

1 [UnitedHealth Group Reports Fourth Quarter and Full Year 2021 Financial Results](#)



2 [UnitedHealth Ends 2021 with a Note of Cheer](#)



3 [UnitedHealth Group Reports 2021 Results](#)



New Digital Health Tools

New Digital Health Tools: Adoption and implementation hold the key for payers for sustainable results.



In 2021 alone, \$44 billion was raised globally in health innovation – twice as much as 2020 – and the acquisition of health and health tech companies rose 50%.¹



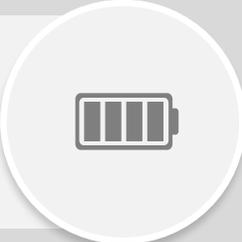
Over 1200 US digital health companies have attracted a cumulative 33 billion USD in investment, from 1.1 billion USD in 2011 up to 14 billion USD in 2021. The Food and Drug Administration (FDA) has also just recently begun approving digital therapeutics, and options for consumer-facing digital health tools are rapidly growing.²



Novant Health has disclosed two new digital tools aimed at assisting patients in obtaining care and making well-informed decisions. It has announced virtual assistant and physician matcher solutions that may connect patients to clinical support and medical information.³

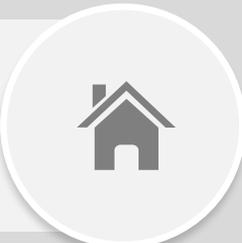
1

[Predictions 2022: What are the biggest healthcare shifts? Here's what health experts think](#)



2

[Deploying digital health tools within large, complex health systems: key considerations for adoption and implementation](#)



3

[Novant Health's new tools to aid patients in digital care](#)





Medicaid enrollment on the rise

- Delta and Omicron COVID-19 variants setting the trend
- States devising new policies around Medicaid
- Further administrative actions expected to expand coverage

Uneligible population may see transition to subsidized marketplaces



Innovation remains the key for payers in 2022

- Payers are likely to invest more in strengthening cyber security
- Behavioral and physical coverage integration is required
- Telehealth expansion to continue in primary, behavioral and occupational health

Utilizing every bit of available data is crucial



Payers to focus on value-based care for growth

- Payers are shifting more customers to value-based care
- Serving Medicare Advantage consumers remains a priority
- Technology helping payers sharpen their end-to-end experience

Pandemic has triggered moderately higher levels of attrition



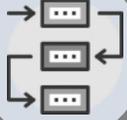
How payers interact with customers is now tech-driven

- No clear CMS guidance on reimbursement for using digital tools
- Growing number of tools are directly connect to EHRs
- There's need for a robust structure for data governance

Tools with an ability to demonstrate ROI are in demand

Complex NO Surprise Act



 Build Back Better Act to decide Medicaid coverage future

 Tech innovations priority for payers in 2022

 UHG aims to scale further heights in terms of earnings per share

 Identifying tools functionality and financial sustainability is more crucial than ever before



Andrew Witty
CEO, United Healthcare

“Our strong 2021 performance and confident growth outlook for 2022 and beyond reflect the accelerating innovation and expanding capabilities across Optum and UnitedHealthcare.”



Anthony Capone
president of DocGo

“The opportunity to expand our mobile health services to millions of new patients further reinforces our commitment to bridging gaps in care and making quality healthcare accessible for all,”



Stuart Hanson
founding CEO of Avaneer Health

“Addressing administrative costs and creating a positive consumer experience requires connectivity and the type of data fluidity we have come to expect in other industries,”



Michael Neidorff
Centene Chairman and CEO

“Our combined company will have expanded reach in a variety of specialty services and will provide increased access to behavioral health care during a time of need for the communities we serve,”

Our Publications Your Lead Gen Platform

DistilINFO HEALTHPLAN

Publication	Reach	eNewsletter Frequency	Ad Options	Impact
DistilINFO HEALTHPLAN	100,000+	Every Tuesday & Thursday	Banner Ad	Visibility
DistilINFO HOSPITAL IT	60,000+	Every Monday	eBlast	MQL
DistilINFO POPHEALTH	11,000+	Alternative Fridays	Static Banner	Visibility
DistilINFO GOVHEALTH	35,000+	Alternative Wednesdays	Interview Ad	MQL
DistilINFO LIFE SCIENCES	42,000+	Every Monday & Tuesday	Content Ad	Visibility
DistilINFO AGING	24,000+	Alternative Fridays	Google Ads	MQL
			Linkedin Ads	Visibility

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Promote your brand to
100,000+ Health Plan
focused decision makers..

Typical Results

Visibility	In a Week..	In a Month..
CxO Level	~75+	~150+
VP Level	~200+	~300+
Director Level	~400+	~600+
Others	~500+	~800+
Marketing Qualified Leads		
MQL's	~20 to ~50	~50+

Contact Us



Susheel Ladwa

Editor
susheel@distilinfo.com
+1.952.484.6873
www.distilinfo.com



Hiral Dave

Senior Editor
hiral@distilinfo.com
[LinkedIn](#)