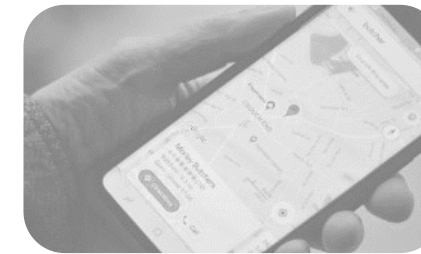
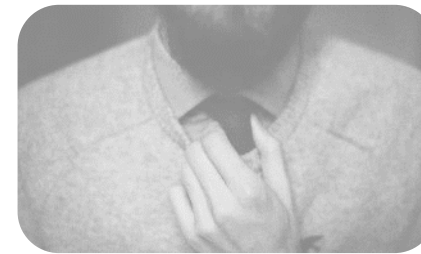


August 2021:

HEALTH PLAN INDUSTRY

Market Intelligence Report





Month of M&A
and New
Ventures

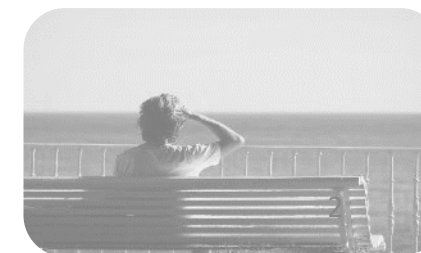
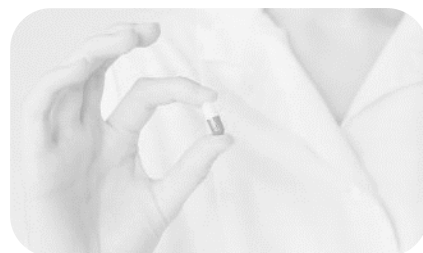
Interoperability
Execution

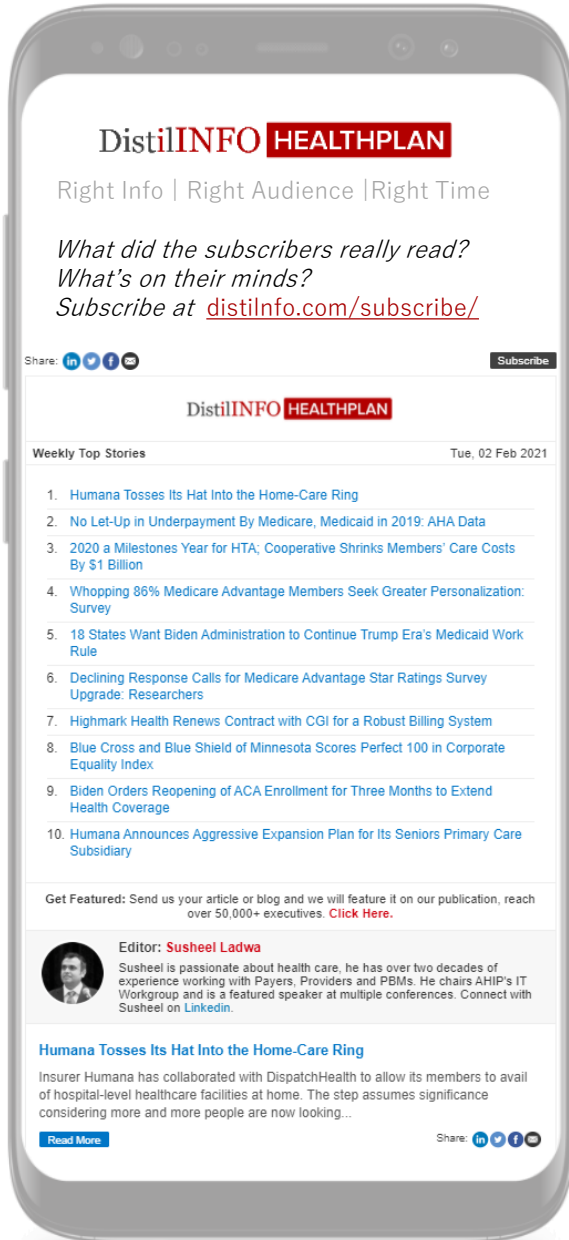
ACA is Here to
Stay

Stable ACA
Marketplace

DistilINFO **HEALTHPLAN**

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





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

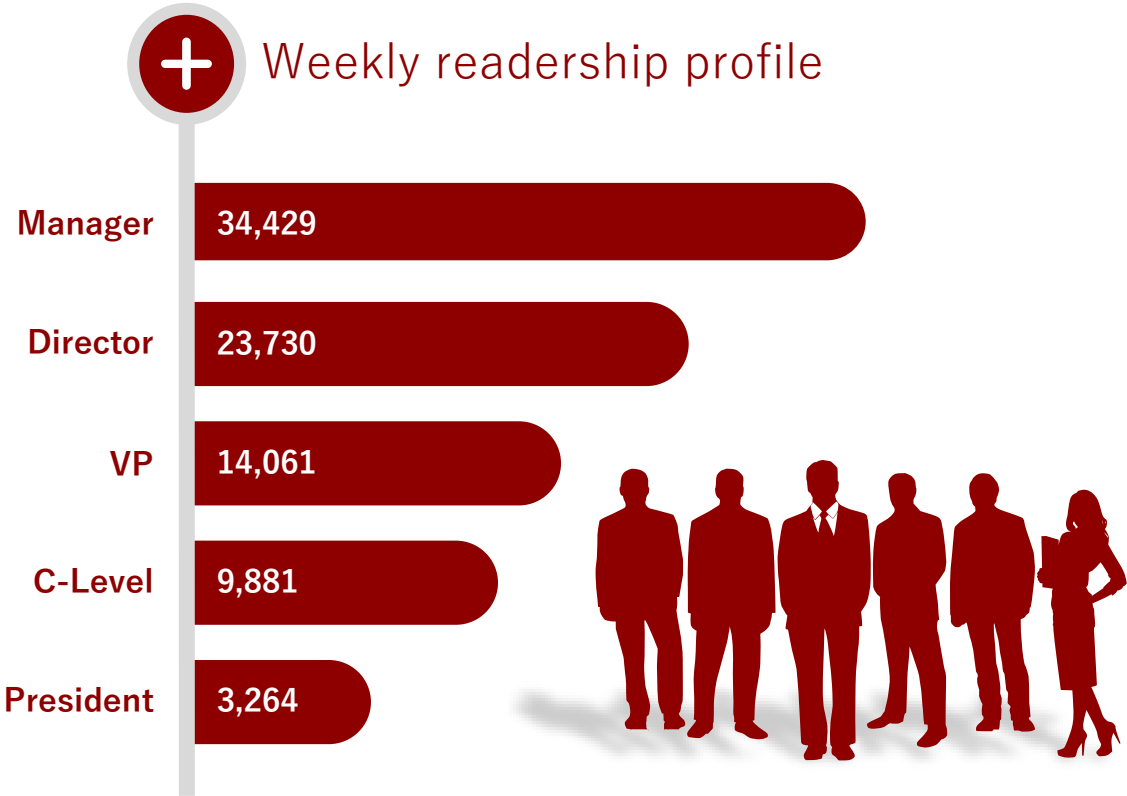


DistilINFO HEALTHPLAN

Popular articles in
August 2021 in Health Plan Newsletter

1. [BCBS Executive John Orner replaces Highmark Health's retiring CIO](#)
2. [Acquisition of Lasso Healthcare to give Zing a national footprint](#)
3. [Anthem purchases MMM Holdings from InnovaCare](#)
4. [Ex CMMI director launches new value-based healthcare company](#)
5. [Athenahealth ex-CEO Jonathan Bush launches Health IT platform](#)
6. [Healthcare Payers applaud Supreme Court's Dismissal of ACA litigation](#)
7. [Falling Premiums, Growing Participation Steady ACA Marketplace](#)
8. [Price Transparency: 5 Ways to Stay Ahead](#)
9. [Factors Shaping US Healthcare Policy of the Future](#)
10. [Highmark to take Gateway's full ownership](#)

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



CxO, VP Level Audience

- Interoperability Execution:** The Final Rule has come into force. But it is just the first step. How to make it successful and sustainable?
- M&A and New Ventures:** It rained M&A and new ventures this month. How will the rise in opportunities in the time of pandemic shape the trends and drivers of the payer industry in the second half of 2021?

Overall Business Audience

- ACA is Here to Stay:** The Affordable Care Act has survived SC challenge for the third time since it was passed in 2012. Are insurers ready for new policies and a sharp competition in the marketplace swelling with new beneficiaries?
- Stable ACA Marketplace:** After facing some volatility in its initial years, the ACA is now a steady marketplace. Enrollments are likely to jump by 1.7 million in 2022. Will it also increase payer's participation?

Month of M&A and New Ventures



In the 12 months through May 15 (LTM), deal volumes and values exceeded 2018, 2019 and 2020 levels. Gains versus full-year 2020 were broad-based, with most subsectors seeing double-digit growth in deal volumes.¹

Compared with 2014-2020 annual average volumes, two sub sectors saw notable increases: physician groups (likely related to market fragmentation and pandemic-driven financial pressure), and behavioral care (likely related to long-term and pandemic-driven demand).¹

There's also an increased appetite for InsurTech acquisitions to meet customers' digital engagement demands and support employees' new work-from-home needs.²

There's also an increased appetite for InsurTech acquisitions to meet customers' digital engagement demands and support employees' new work-from-home needs.²

DistilINFO HEALTHPLAN

Month of M&A and New Ventures: Consumer-centric approach in the post pandemic world has kicked off much required reforms for the health plan industry. What's driving the current trends of healthcare M&A

1

[Biden's 5 Key Health Initiatives to Re-engage with Global Community](#)



2

[Pandemic and Beyond: Key Bills to Make Telehealth Coverage Permanent](#)



3

[Under new administration, best time to lobby for health care may be now](#)



Interoperability Execution

Interoperability Execution: Interoperability for payers has just taken off. What are the factors that shape its trajectory?



According to Deloitte, 63 percent of health plans and nearly half of health system leaders say they plan to use the new compliance requirements as part of their broader strategy around interoperability and customer engagement.¹

Given the risks associated with sharing the wrong types of data, the consent management system must become a system of record that is trackable, auditable, and reportable, all of which create their own challenges.¹

Providing data access to third parties whilst maintaining a semblance of privacy is an important and costly tradeoff. Moreover, the expectation with the newer regulations is to provide public access to certain types of information as APIs, which means those APIs need to be protected from common public attacks as well.²

The rule mandates companies to share claims and other electronic health information with patients using application programming interface (API) technology. Mere implementation of rules is not enough. It is compliance by payers and providers along with adoption by consumers that holds the key.³

1

[A defining moment for digital behavioral health: Four market trends](#)



2

[Behavioral Healthcare Parity Is Low Among Regional, State Plans](#)



3

[BCBS set to lead behavioral health operations: CMO Webster](#)



ACA is Here to Stay



1.2 million Americans have selected policies for 2021 during a special enrollment period that Biden launched in mid-February to expand coverage to the uninsured. It runs until mid-August.¹



The survey indicates that the uninsured rate among people ages 19–64 in the first half of 2021 was 9.9 percent, a rate below those recorded in 2020 and 2019 in both federal and private surveys.²



The pandemic-related coverage losses were relatively small, as this survey confirms, and the majority of people who lost coverage ultimately gained other coverage.²



Recent legislation and increased stability to the Marketplace has led to many health plans to begin positioning themselves to enter the Marketplace to capitalize on this growing opportunity.³

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ACA is Here to Stay: Legal hurdle against affordable health care has been cleared. What role the health plans play to widen the coverage?

1

[The U.S. Government Is Investing \\$80 Million To Create A New Public Health Informatics & Technology Program](#)



2

[With \\$20B Raised Globally in the First Half of 2021, Health Innovation Funding Shows \(More\) Record Growth Post COVID](#)



3

[The next big move for Amazon, Apple & Google: Health insurance?](#)



Stable ACA Marketplace



The fall in premiums surely has not been as steep as the rise recorded in 2017 and 2018. But it clearly indicates that the path for a steady marketplace has been paved with plenty of room for expansion considering an increasing role of health insurers.¹

The benefit's zero-premium health care plans just became available, as of July 1, and there are no income limits to qualify. But you must meet one big eligibility requirement.²

Given that unemployment has remained high this year as the pandemic has lingered, the field of Americans who might take advantage of the free health care is massive.²

In 2021, the Affordable Care Act (ACA) Marketplaces entered their eighth year of operation and appears to be approaching a steady path, as reflected by premium growth. Predictions that the federal and state Marketplaces would shrink over time or fail in some areas of the country have not come to pass, and insurer participation is increasing.³

Stable ACA Marketplace : What are the concern haunting or helping the health plan executive in planning for post pandemic world?

1

[Why Out-of-Pocket Costs for COVID-19 Care May Skyrocket in 2021](#)



2

[Covid Isn't Done Changing the Life Insurance Industry Just Yet](#)



3

[Now is the Time for Payvider Adoption & Growth](#)



Key Takeaways



Consumer Experience Reigns Supreme for Interoperability

- A consumer-friendly approach by payers and providers on mobile apps and websites will go a long way in ensuring the success of the initiative
- When implemented effectively, interoperability can also reduce the burden of certain administrative processes, such as prior authorization
- The technology will benefit member decision-making processes and could lead to a drop in healthcare costs

An opportunity to unleash innovation



Growing Appetite for Deals

- Regulatory shifts, capital availability, evolving competitive dynamics, innovative technologies and commitments to patient-centricity attitude are fuelling mergers and new ventures
- Focus is back on competitive advantage in the post-pandemic world
- Pandemic-induced uncertainty has necessitated the need for adding scale, collaborations, and multiple revenue streams

More healthcare companies are likely to take the IPO route



The Fight for Healthcare has Just Begun

- Policymakers should continue to focus on expanding Medicaid
- Use ACA subsidies in non-expansion Medicaid states to extend federal marketplace coverage
- COVID proved the importance of ACA as people lost jobs and health insurance sponsored by their employers

Some specific provisions, and not the full law, may face legal challenges in future



State Policy and Insurers Participation Matter in Deciding Premiums

- Declining premiums have set the tone for more participation of insurers soon
- A projection by the Congressional Budget Office says the marketplace enrollment will increase by 1.7 million in 2022
- Insurers can have confidence in the administration's support to the ACA for the foreseeable future

Payers should be ready with resources to pursue future exchange businesses

Executives' Insights



Quality + Home + Care



Sustainability is the key to survival



Member engagement is the source of profitability and better outcomes



Being inclusive is as important as being exclusive



Karen S. Lynch
President and Chief Executive Officer at CVS Health

“Bringing our Heart to Every Moment of Your Health “ to guide our footsteps in the months ahead, weaving it into every new initiative and project we introduce to better serve our customers, colleagues, and communities,”



Dr. Steve Miller
Chief Clinical Officer, Cigna, and executive sponsor of the organization's ABLE Enterprise Resource Group (ERG)

“Cigna is deeply committed to advancing our culture of inclusion, diversity, and equality, and we are proud to be recognized by DEI for being a place to work where people of all abilities feel like they belong,”



Felicia Norwood
EVP and President, Government Business Division for Anthem, Inc.

“We are pleased to officially bring MMM into the Anthem family because we share a commitment to being a lifetime partner in health to the people we serve.”



Richard Migliori
CMO MD

“We are continuing to develop our clinical policy as well as our ultimate position on coverage, but in doing so, we're looking forward to getting the guidance that we need from Medicare, and also looking at the clinical evidence that comes from the ongoing clinical trials.”

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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Run Campaigns | Generate Leads | Increase Visibility | [Request Media Kit](#)

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+

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