



# 2010 Payor Survey Results



Survey implemented by nationally recognized research firm – Fabrizio, McLaughlin, and Associates.

Interviews were completed with a combination of traditional phone survey interviews and online through a web survey host portal.

Respondents were screened to ensure they were responsible for negotiating contracts with major health plans.

Potential respondents were contacted through email, U.S. postal mail, fax and/or telephone and asked to complete the survey on an anonymous basis.

Respondents from all 50 states completed the survey.

Data was collected from January 27 through February 26, 2010.

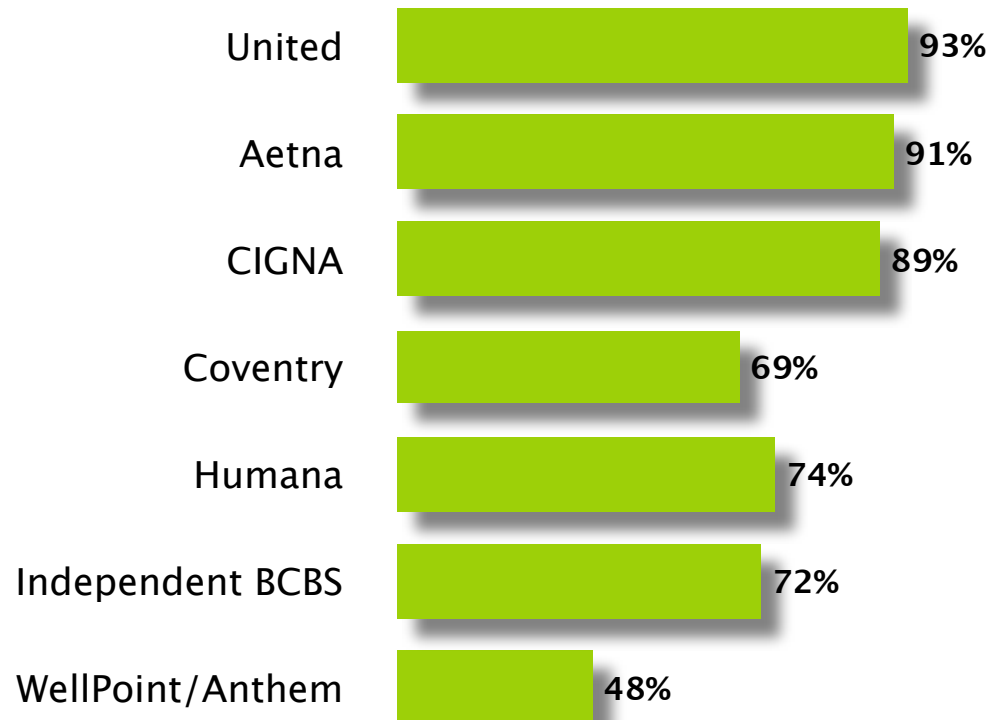
225 interview respondents representing 24% of all hospitals in the U.S. (up from 18% of hospitals last year).

The number of individual participants increased 41% from last year.

# Payors Under Contract



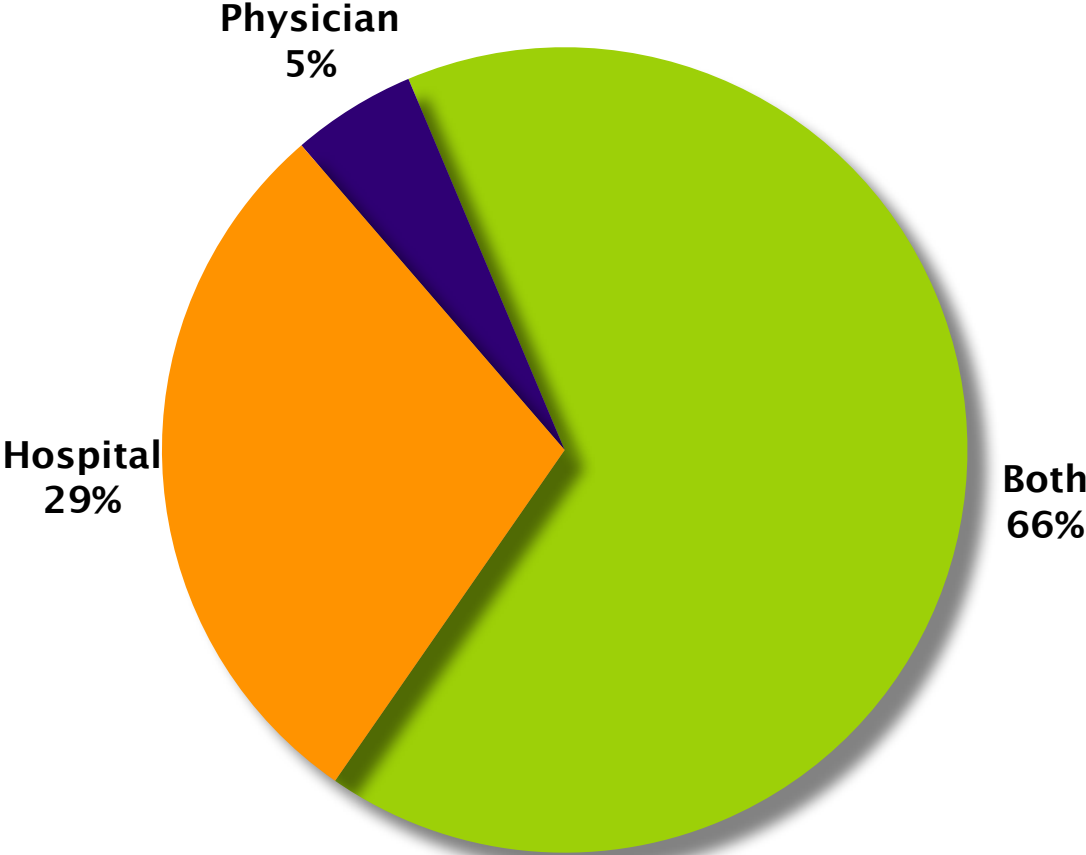
Which of the following major health plans do you negotiate contracts with? Please select ALL health plans that you negotiate with.



# Coordinated Hospital/ Physician Negotiations



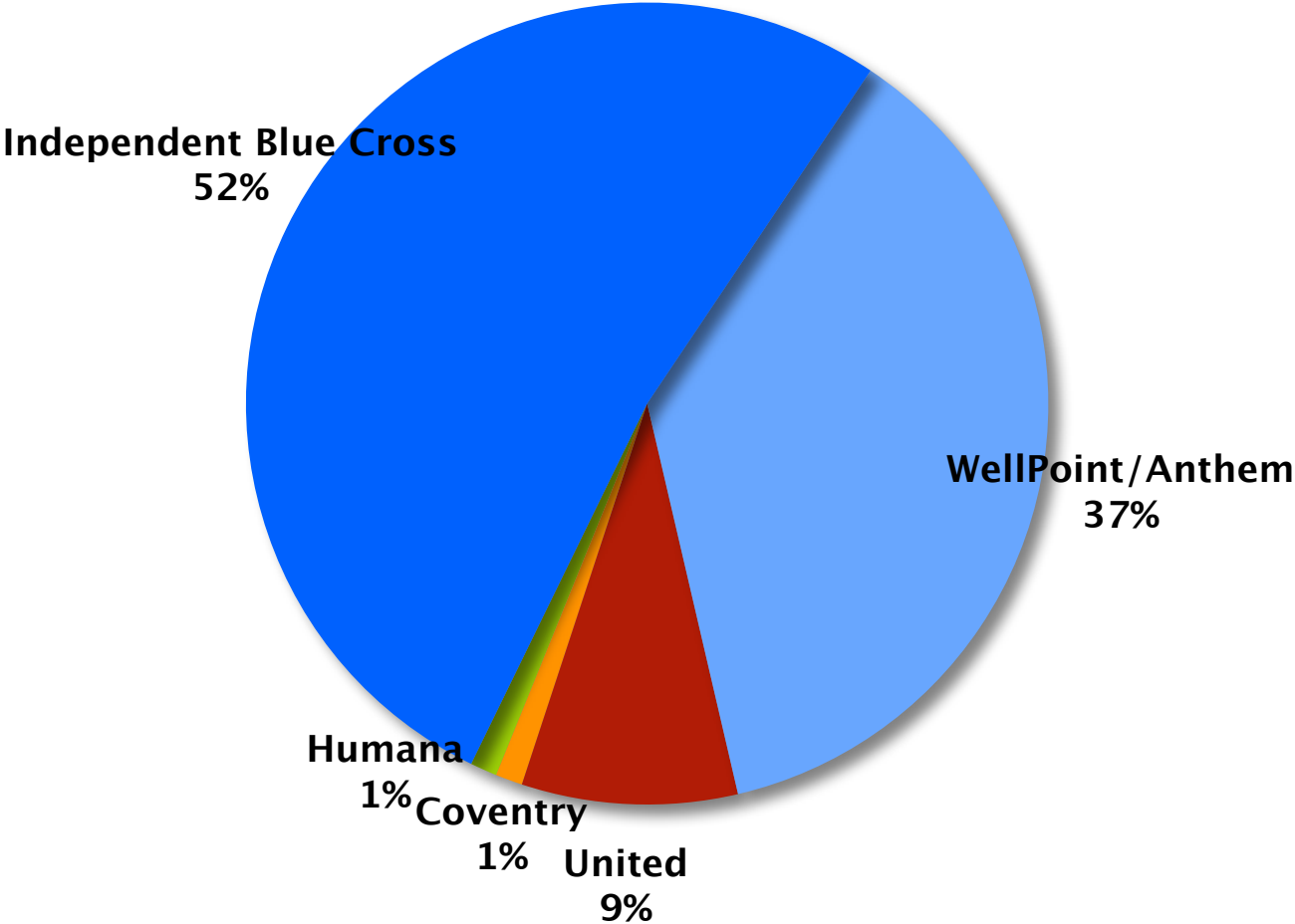
Do you currently negotiate contracts with major health plans for hospitals, physician groups, or both?



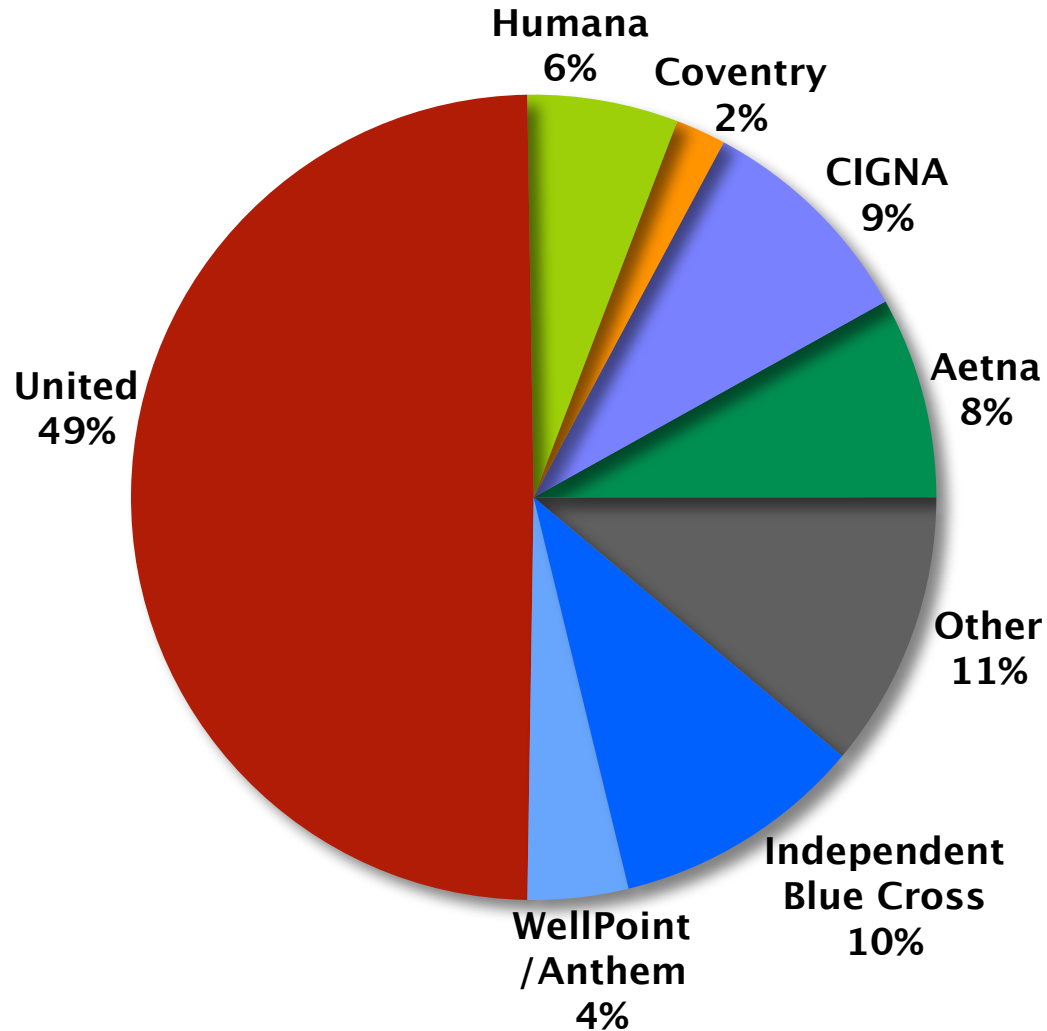
# Biggest Payor



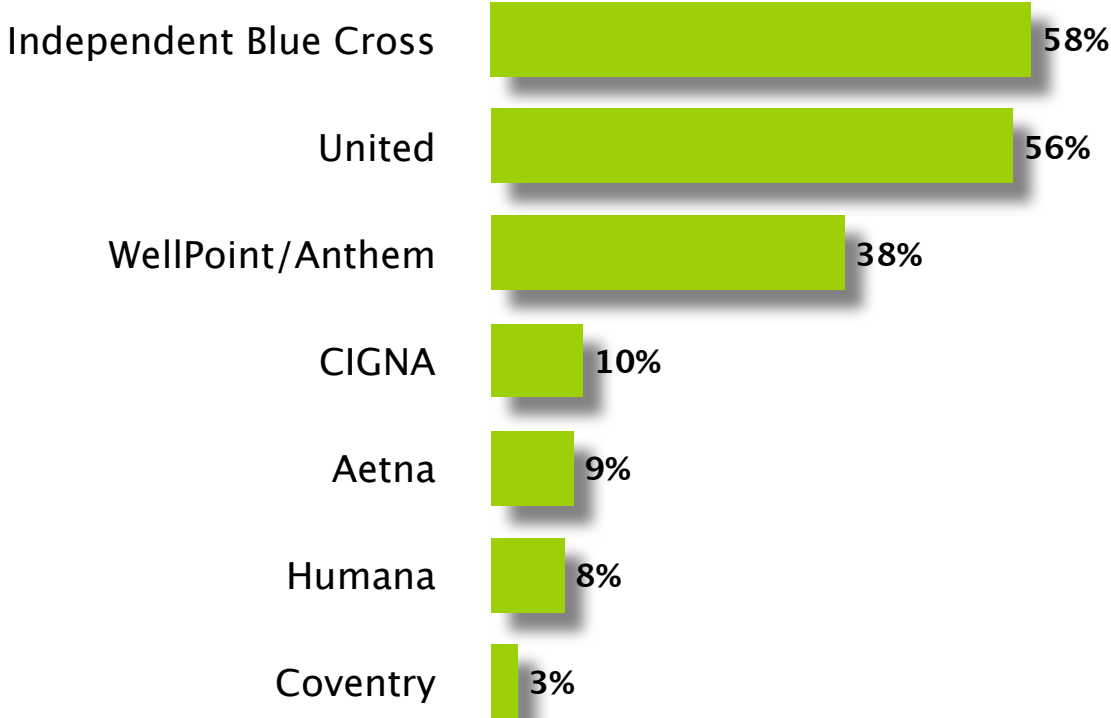
Which of the major health plans that you negotiate contracts with would you say is your **BIGGEST** payor – the one that you do the most business with?



# Second Biggest Payor



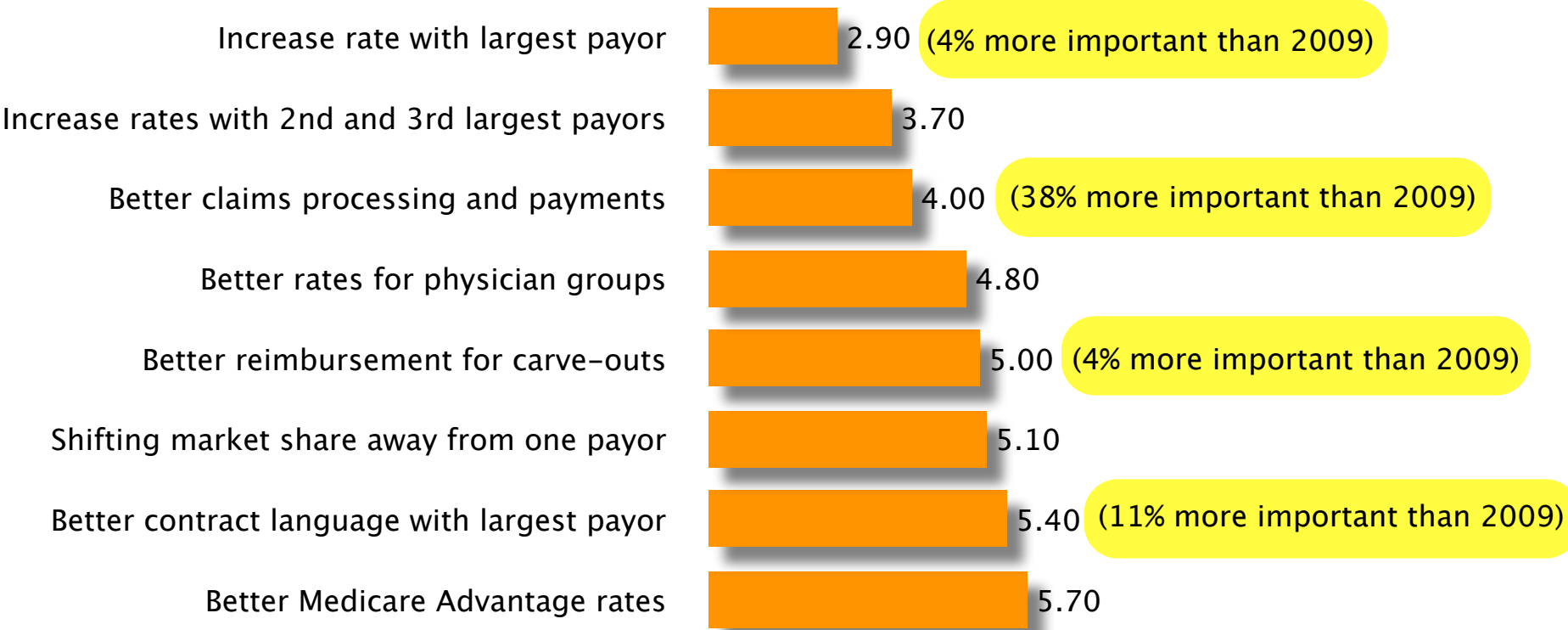
# Combined Top Two Payors



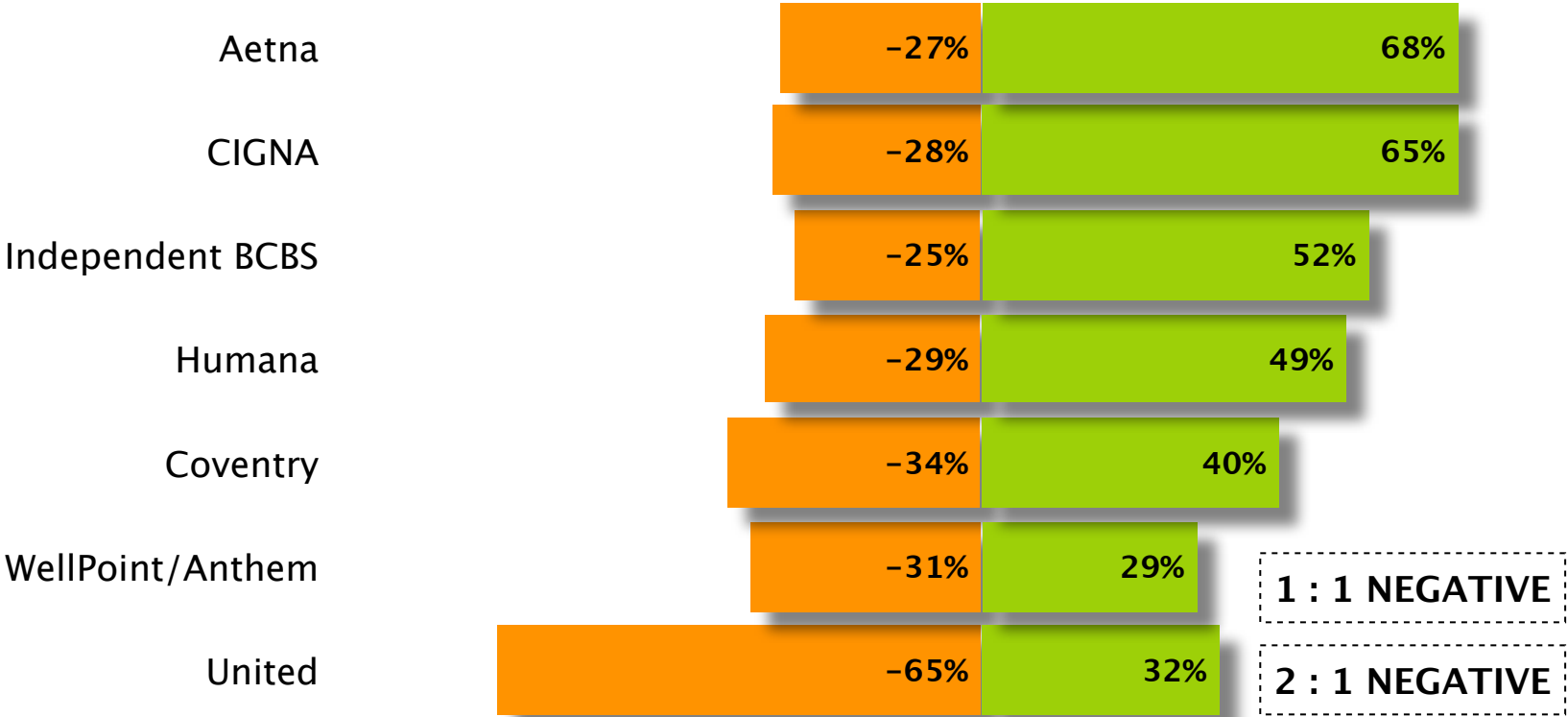
# Priorities for 2010



Thinking about your health plan contracting priorities over the next year, please rank each of the following issues in the order of importance to your organization's success. 1 is most important and 8 is least important.



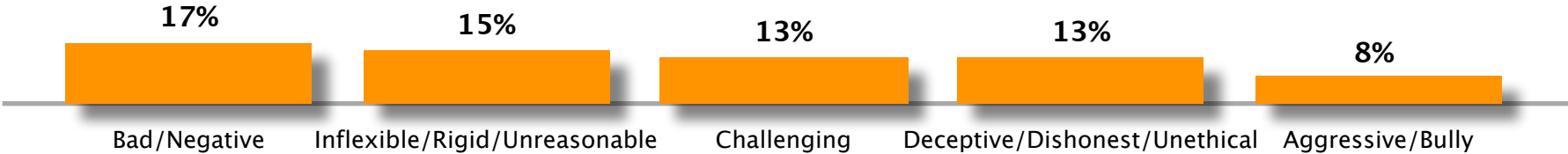
# Payor Image and Reputation



**BIG IMPROVEMENT FOR UNITED - 2009 WAS 82/16 (5:1 NEGATIVE)**



TOP NEGATIVE WORDS USED BY HOSPITALS



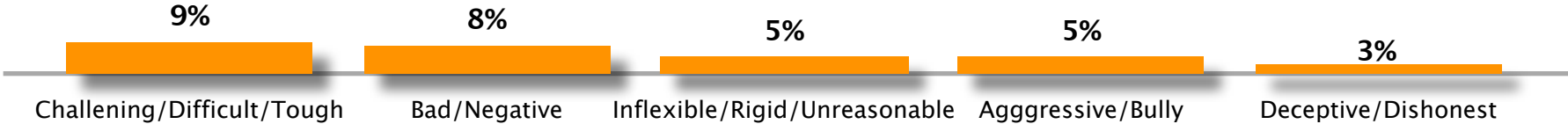
TOP POSITIVE WORDS USED BY HOSPITALS



# WellPoint/Anthem Image and Reputation



TOP NEGATIVE WORDS USED BY HOSPITALS



TOP POSITIVE WORDS USED BY HOSPITALS



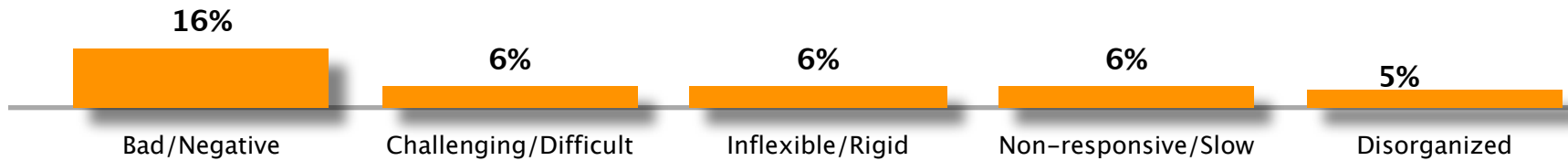
# Coventry Image and Reputation

2010 National Payor Survey

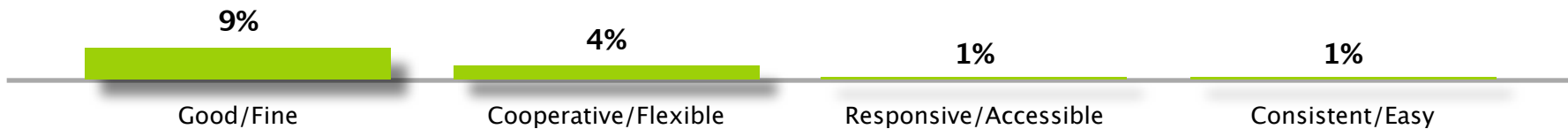
03 . 12 . 2010



## TOP NEGATIVE WORDS USED BY HOSPITALS



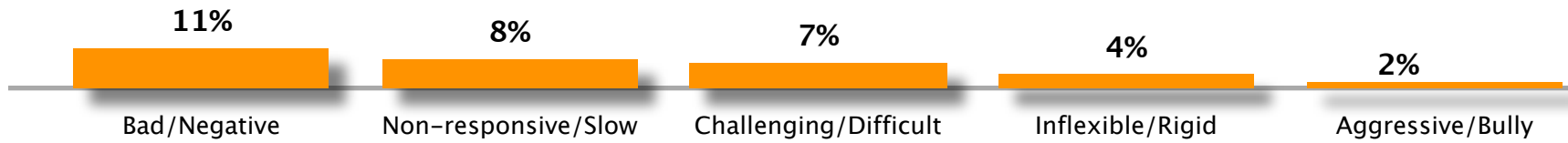
## TOP POSITIVE WORDS USED BY HOSPITALS



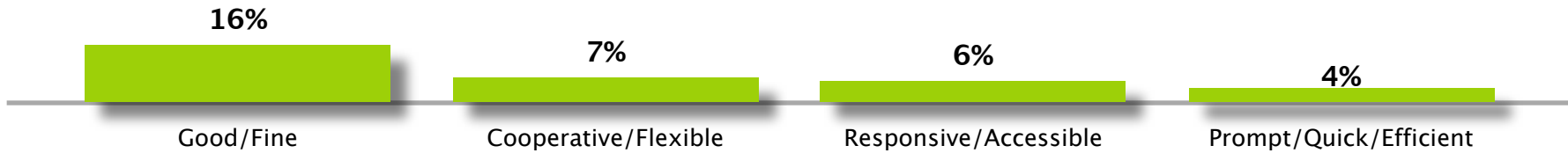
# Aetna Image and Reputation



## TOP NEGATIVE WORDS USED BY HOSPITALS



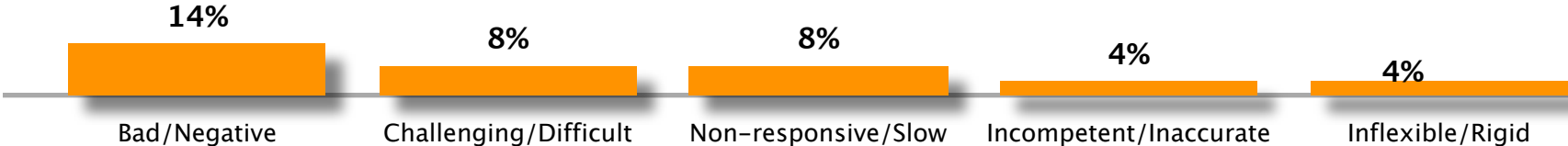
## TOP POSITIVE WORDS USED BY HOSPITALS



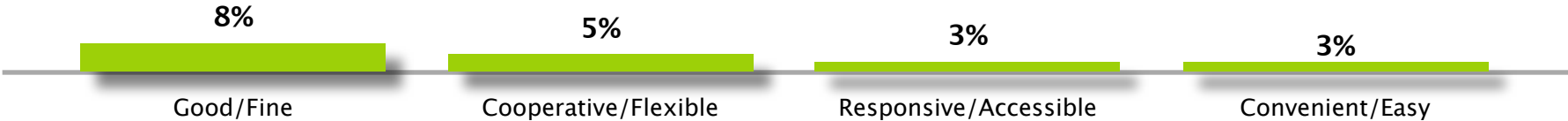
# CIGNA Image and Reputation



TOP NEGATIVE WORDS USED BY HOSPITALS



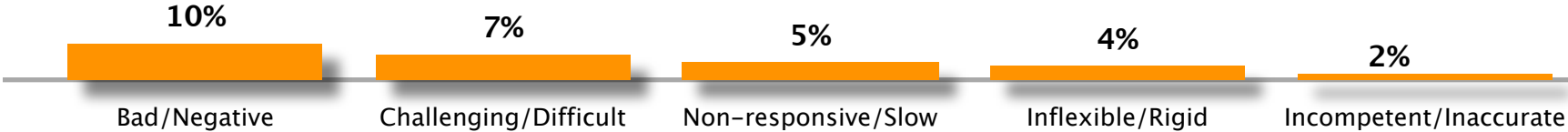
TOP POSITIVE WORDS USED BY HOSPITALS



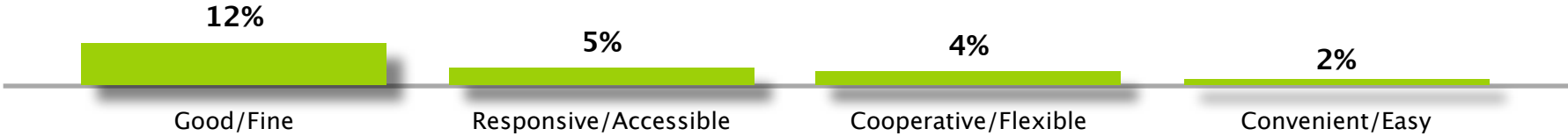
# Humana Image and Reputation



TOP NEGATIVE WORDS USED BY HOSPITALS



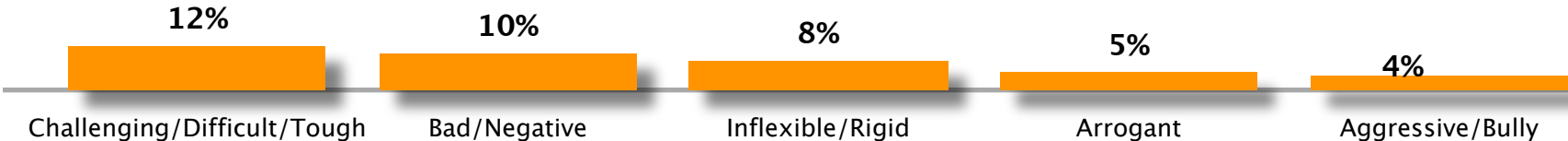
TOP POSITIVE WORDS USED BY HOSPITALS



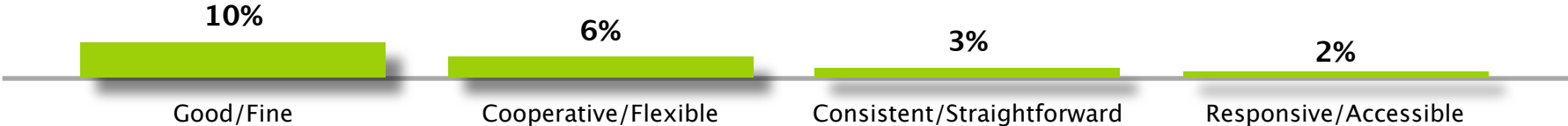
# Independent Blue Cross Image and Reputation



TOP NEGATIVE WORDS USED BY HOSPITALS



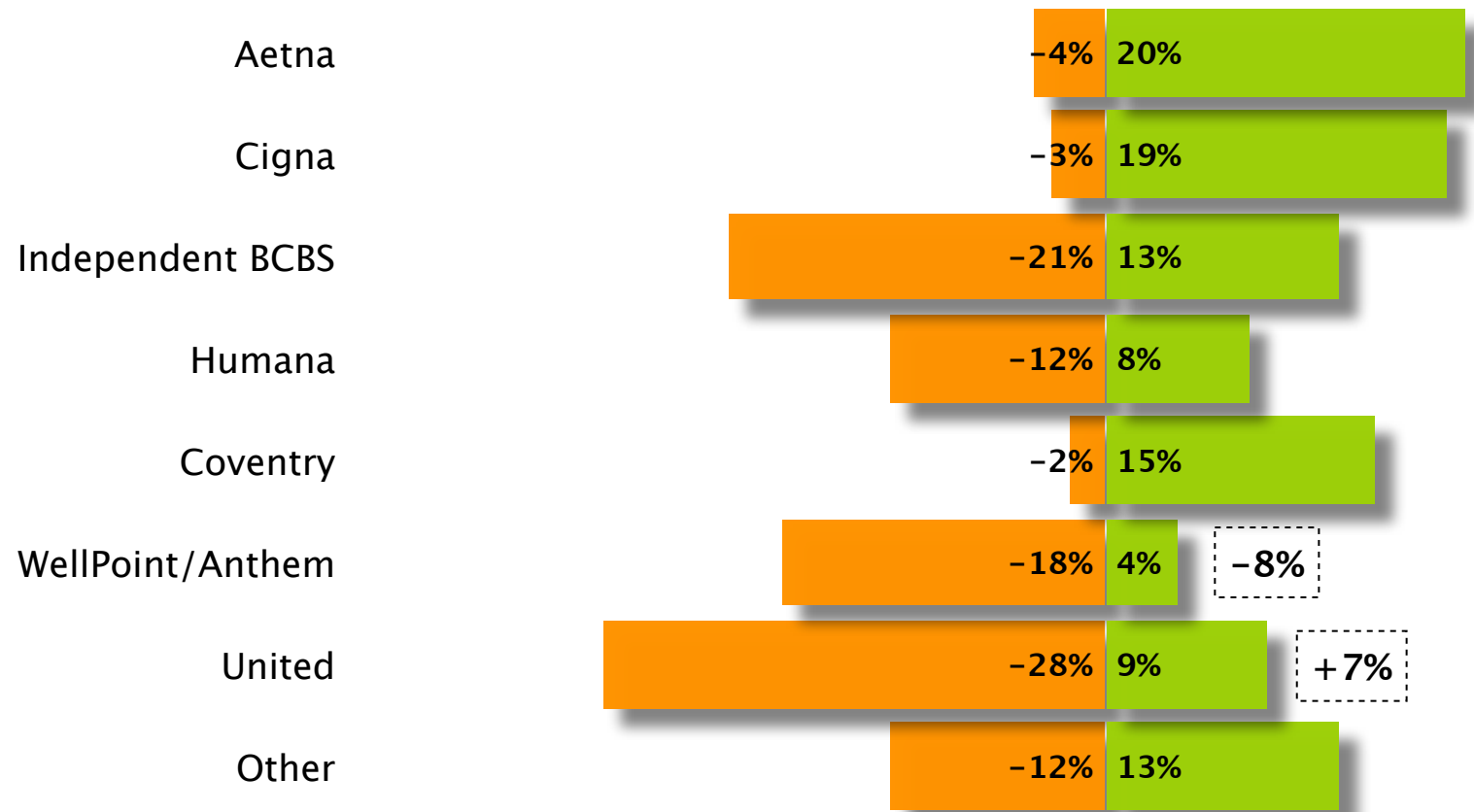
TOP POSITIVE WORDS USED BY HOSPITALS



# Best/Worst for Hospital Payment Rates



WORST BEST



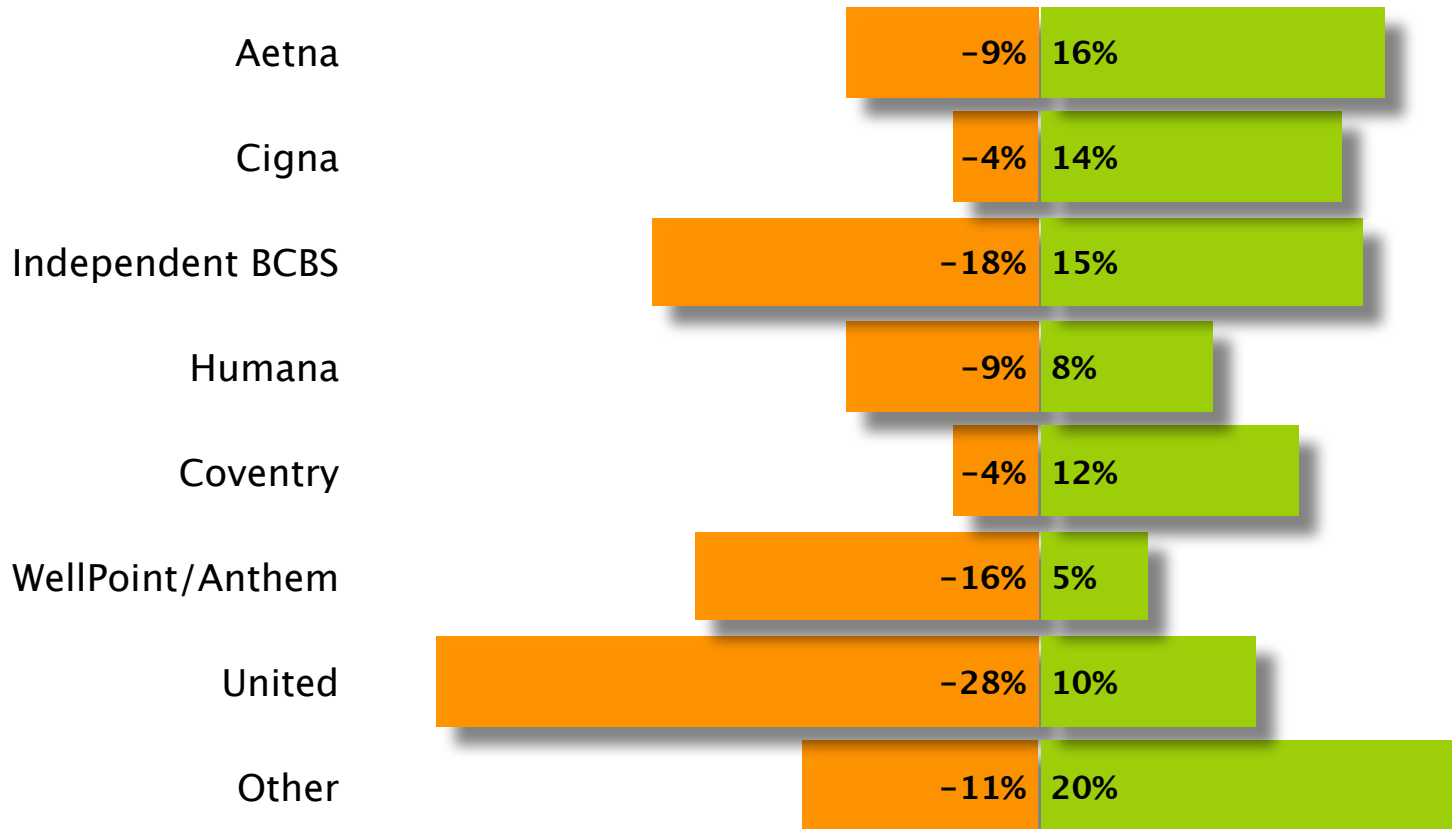
# Best/Worst for Physician Payment Rates

2010 National Payor Survey

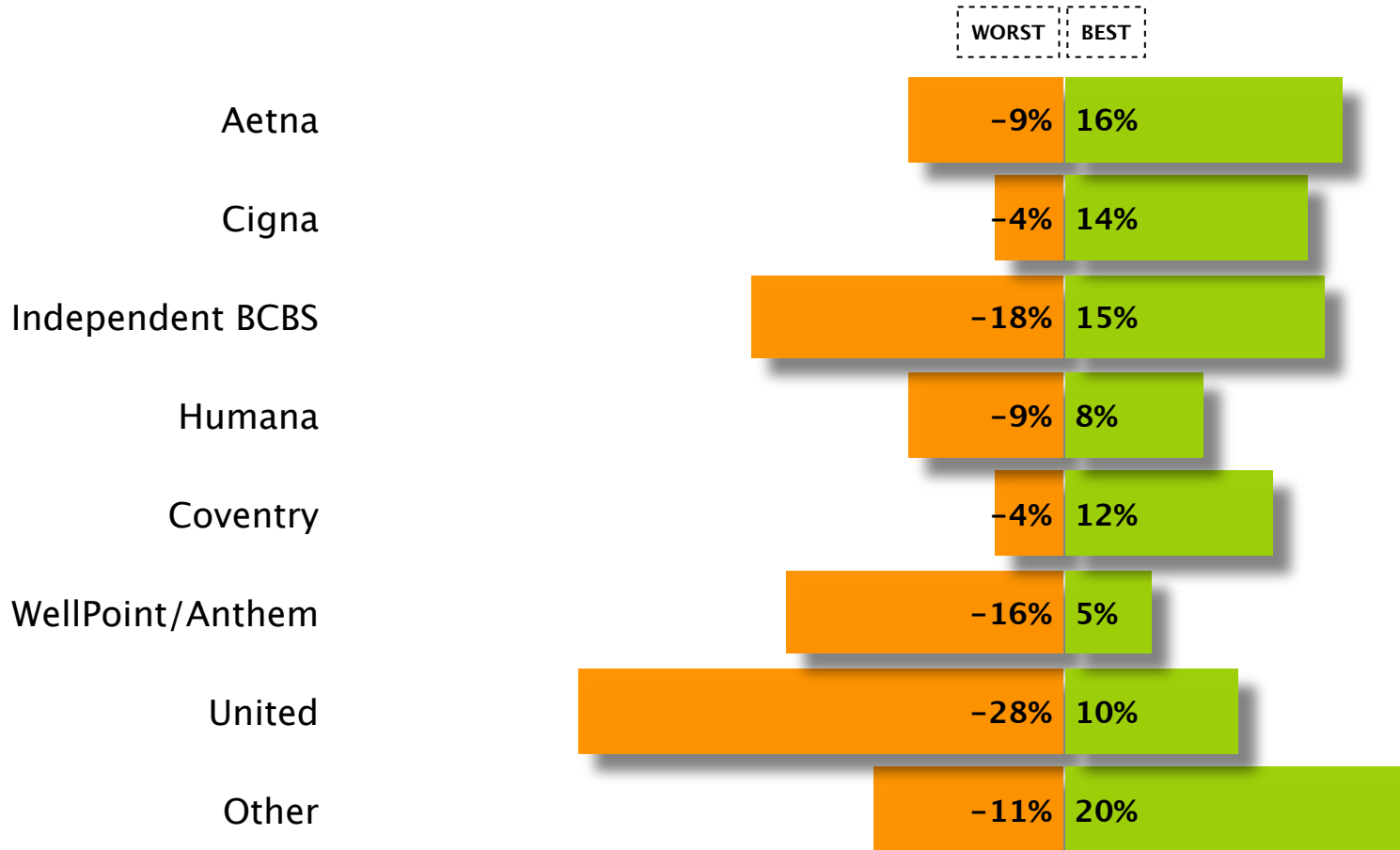
03 . 12 . 2010



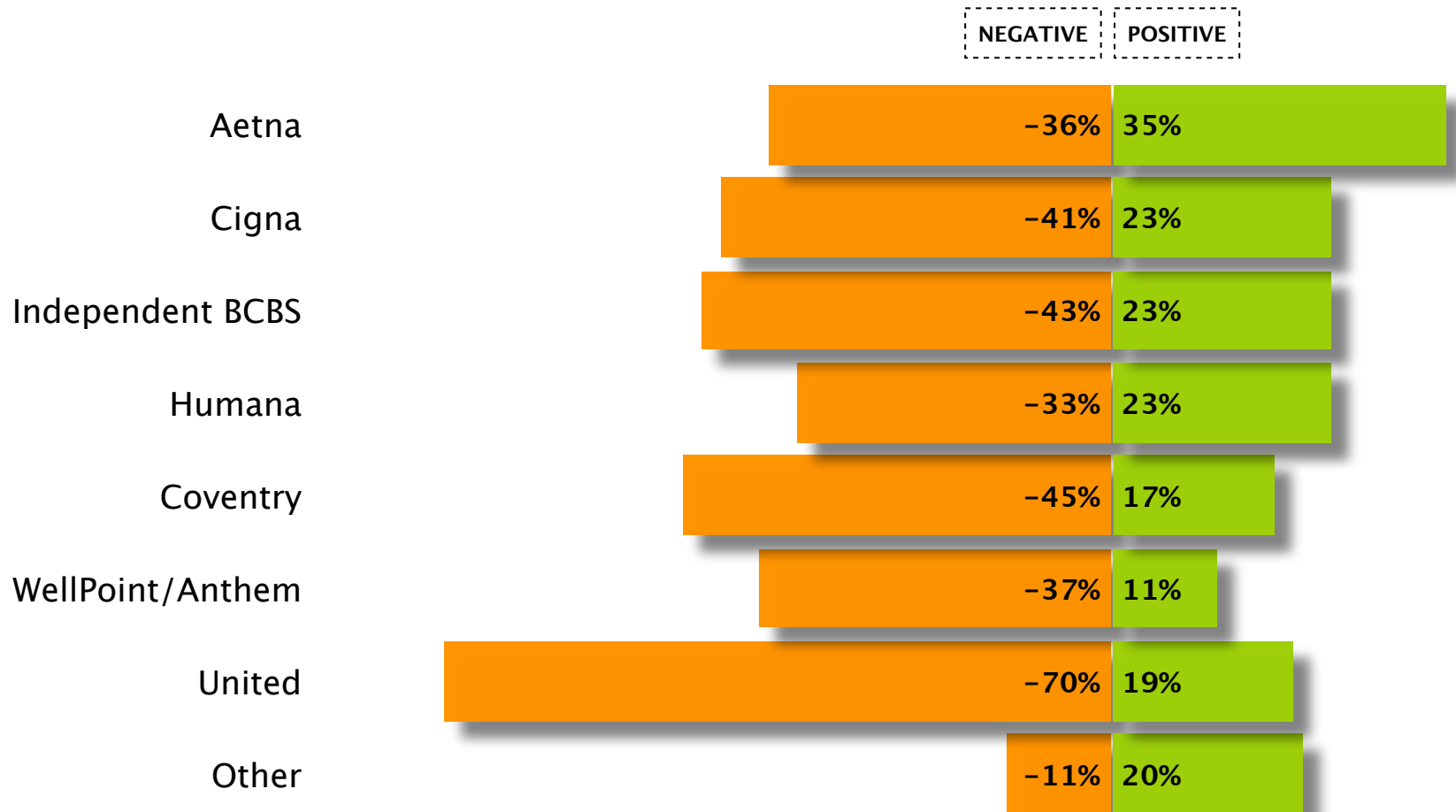
WORST BEST



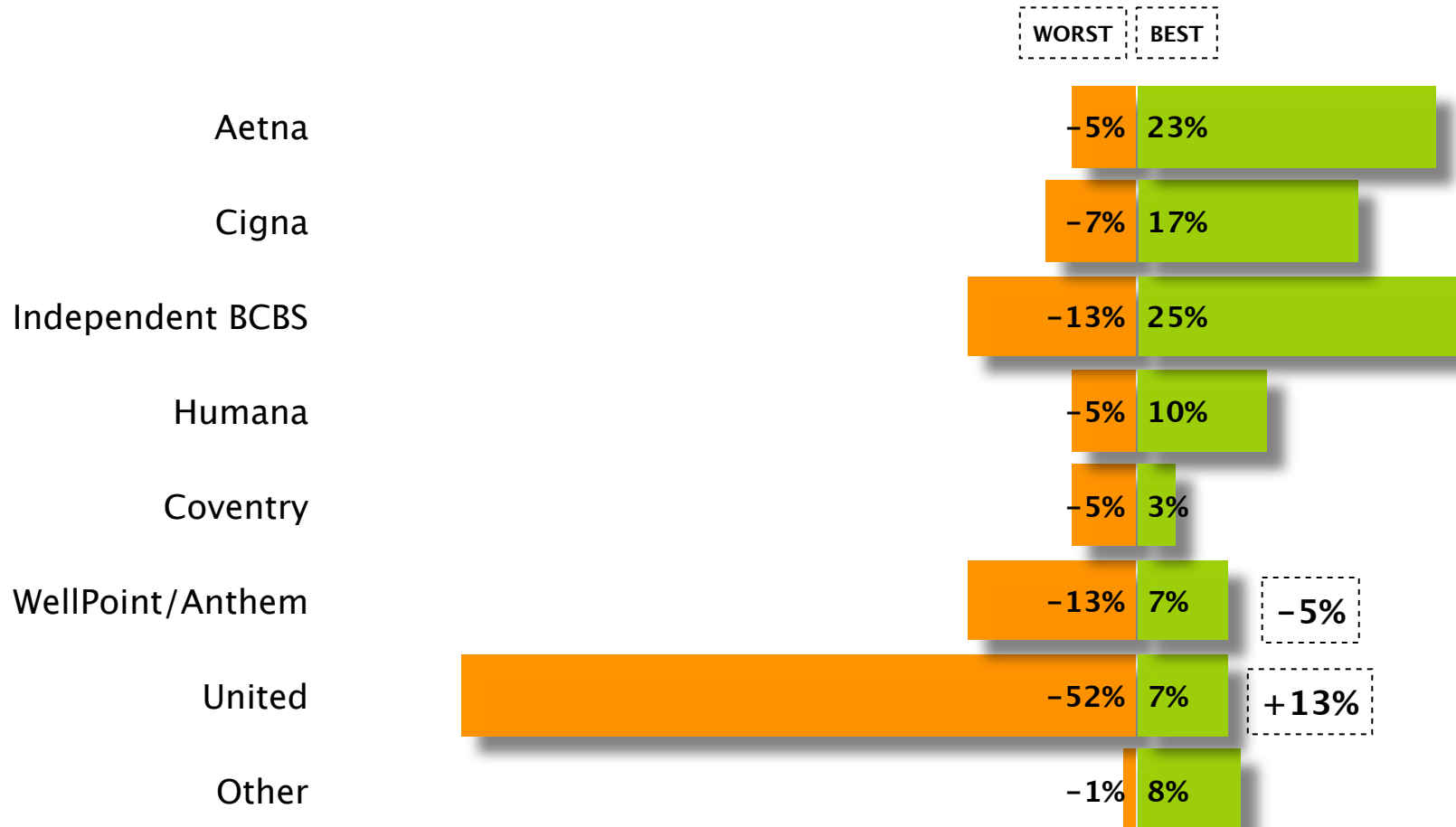
# Positive/Negative Ratings: Physician Payment Rates



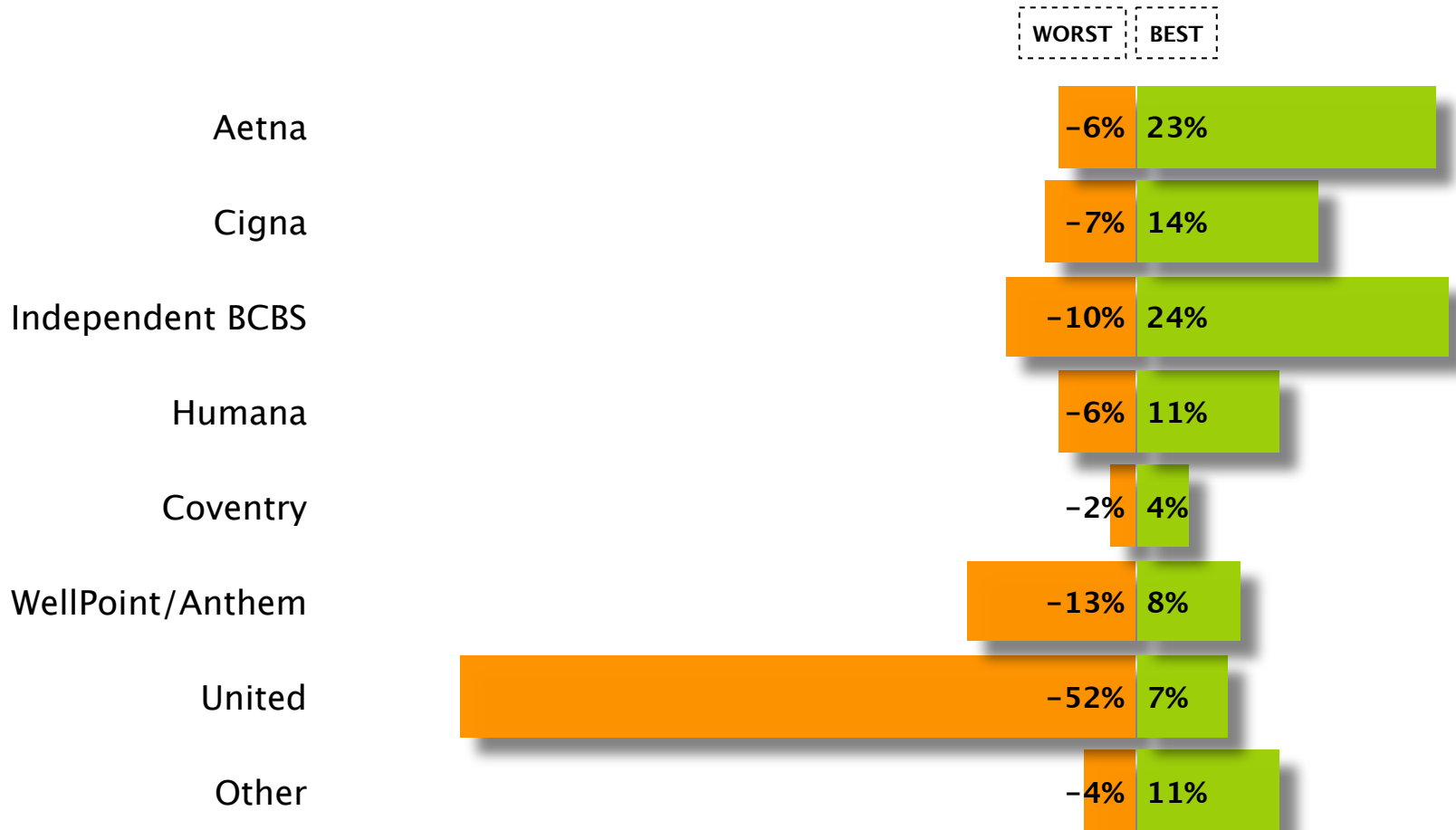
# Positive/Negative Ratings: Dealing with Hospitals



# Best/Worst for Dealing with Hospitals



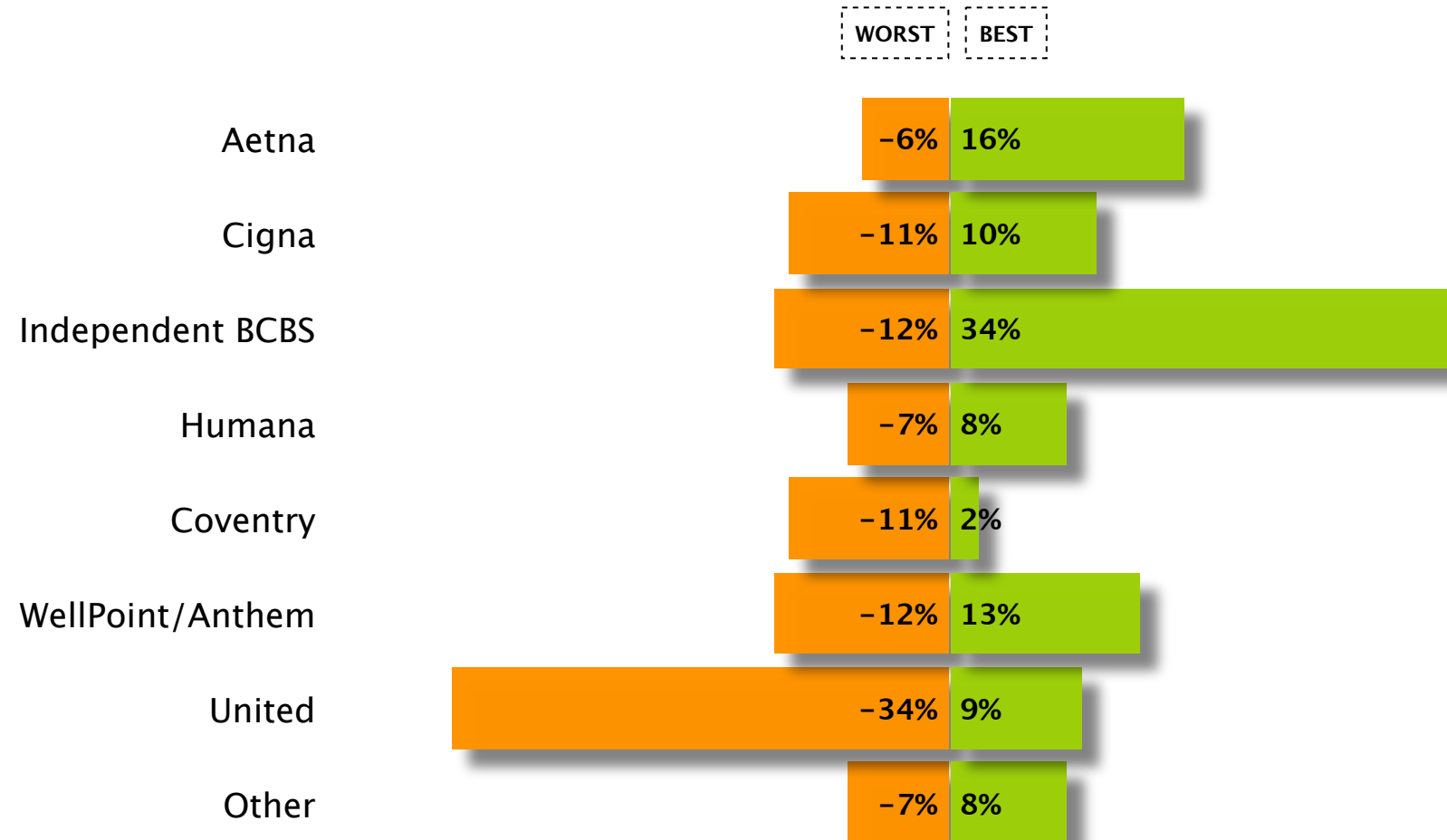
# Best/Worst for Dealing with Physicians



# Best/Worst for



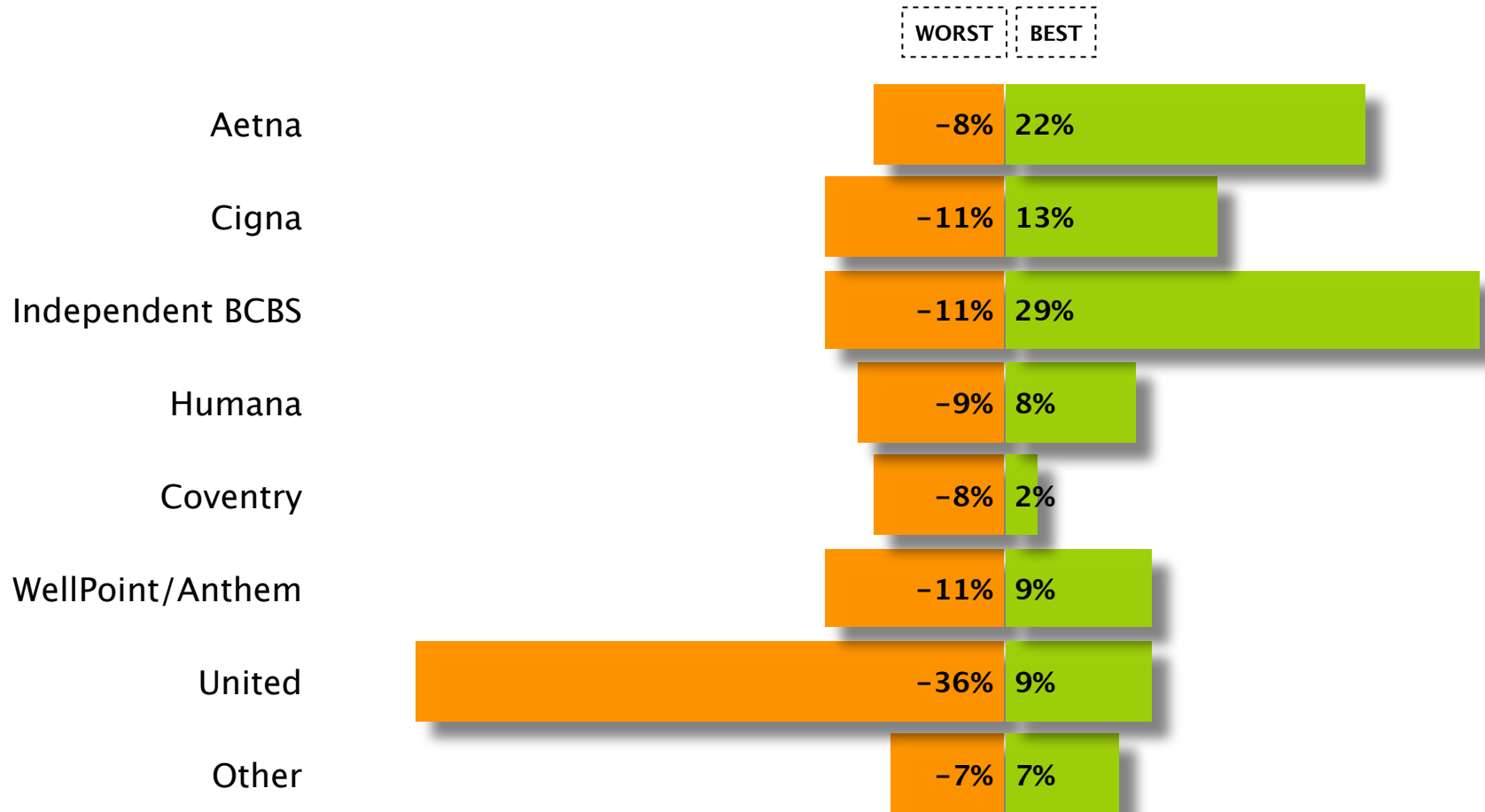
# Paying Hospital Claims Promptly



# Best/Worst for



# Administering Hospital Contract





## Biggest Payors Only

<b>Contract Negotiations</b>	<b>#1</b>	<b>#2</b>	<b>Worst</b>
Easy to Deal With	Independent BCBS	WellPoint/ Anthem	United
Reimbursement Rates	United	Independent BCBS	WellPoint/ Anthem
Honesty and Candor	Independent BCBS	WellPoint/ Anthem	United
Timeliness and Responsiveness	Independent BCBS	United	WellPoint/ Anthem
Processing and Paying Claims	Independent BCBS	WellPoint/ Anthem	United
Fewest Claims Denials	Independent BCBS	United	WellPoint/ Anthem
Fixing Claims	Independent BCBS	United	WellPoint/ Anthem

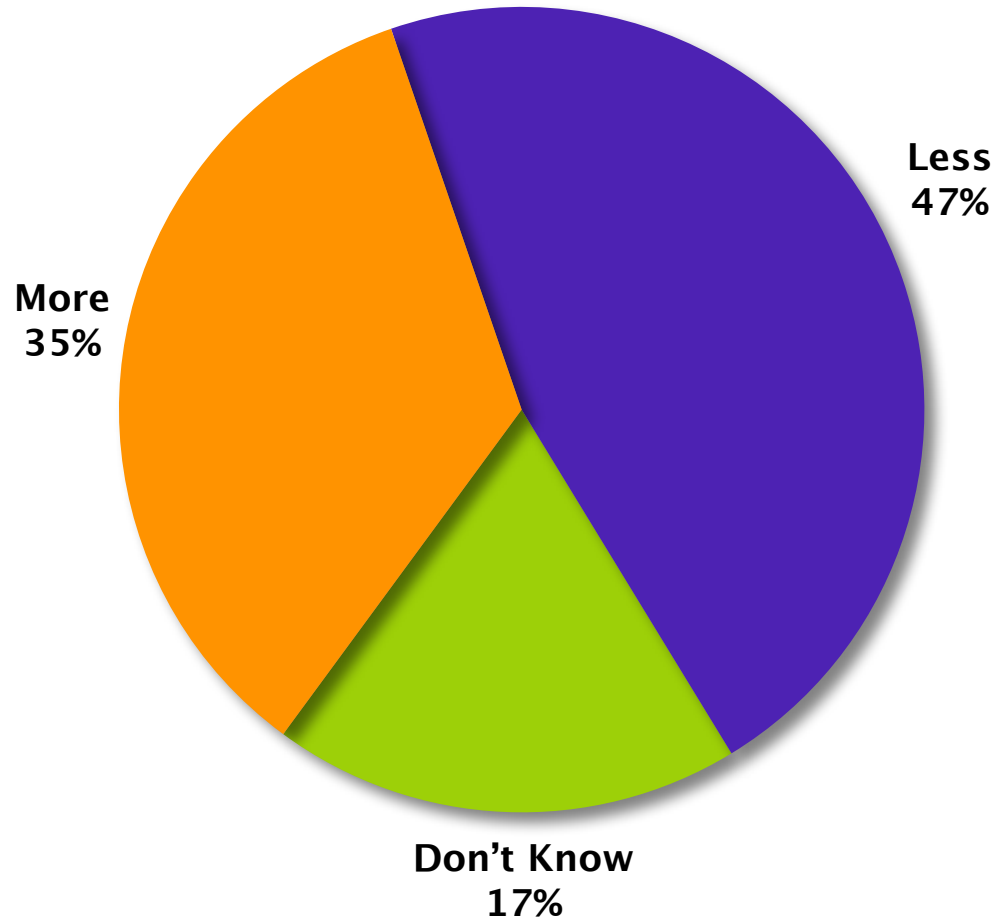
# Health Reform and Negotiating Leverage for Payors

2010 National Payor Survey

03 . 12 . 2010



If health reform legislation is eventually passed, will it create MORE OR LESS negotiating leverage for private payors over the next 2–3 years?



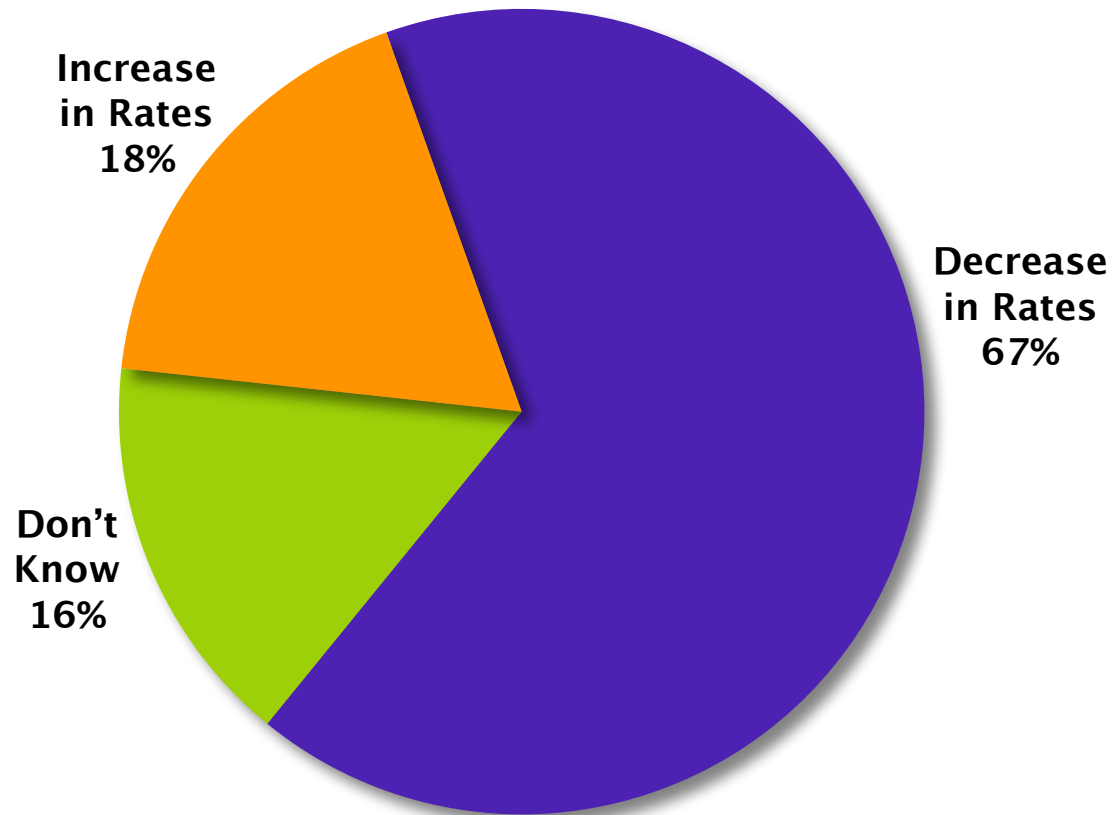
# Health Reform and Impact on Private Payment Rates

2010 National Payor Survey

03 . 12 . 2010



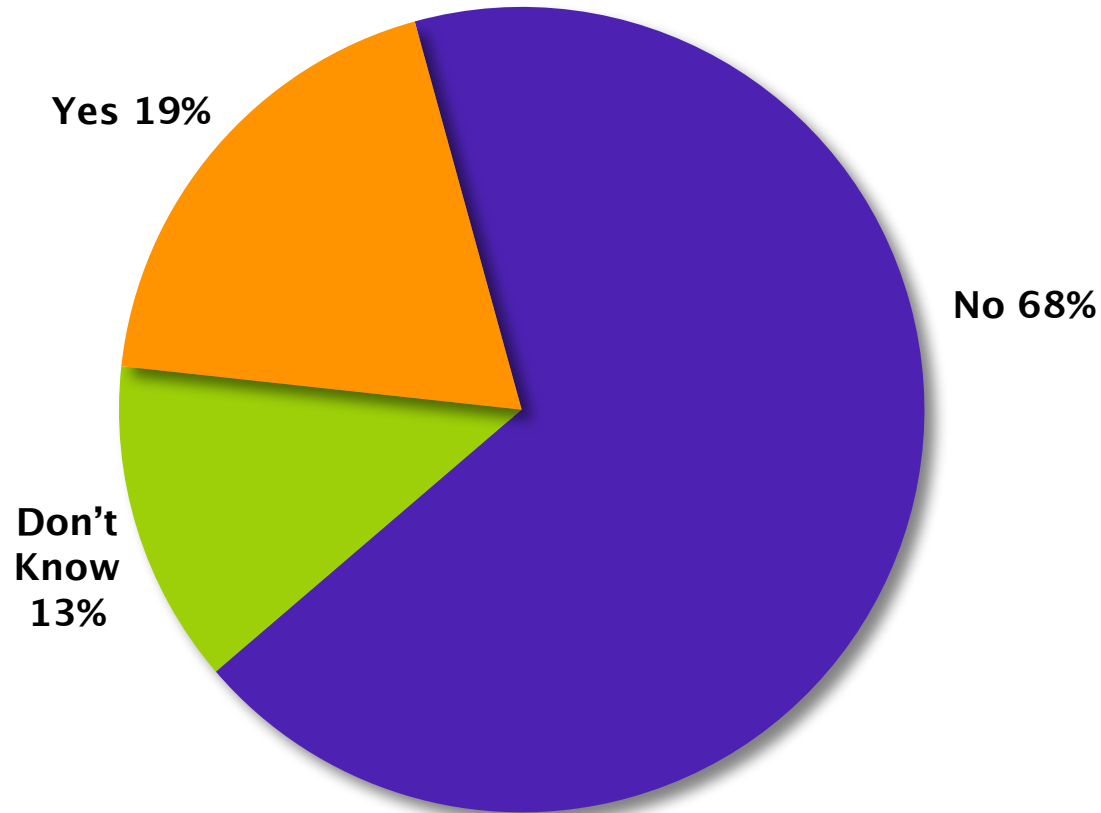
If health reform legislation is eventually passed, will it INCREASE or DECREASE your private payor rates over the next 2–3 years?



# Reduction in Uninsured Compensating for Lower Rates



Do you think that the reduction in the amount of care for the uninsured will make up for any lower private payor rates over the next 2–3 years?





# 2010 Consumer Survey Results



Survey implemented by nationally recognized research firm – Fabrizio, McLaughlin, and Associates.

Interviews were completed using a traditional phone survey.

Respondents from all 50 states completed the survey.

Data was collected from February 24–28, 2010.

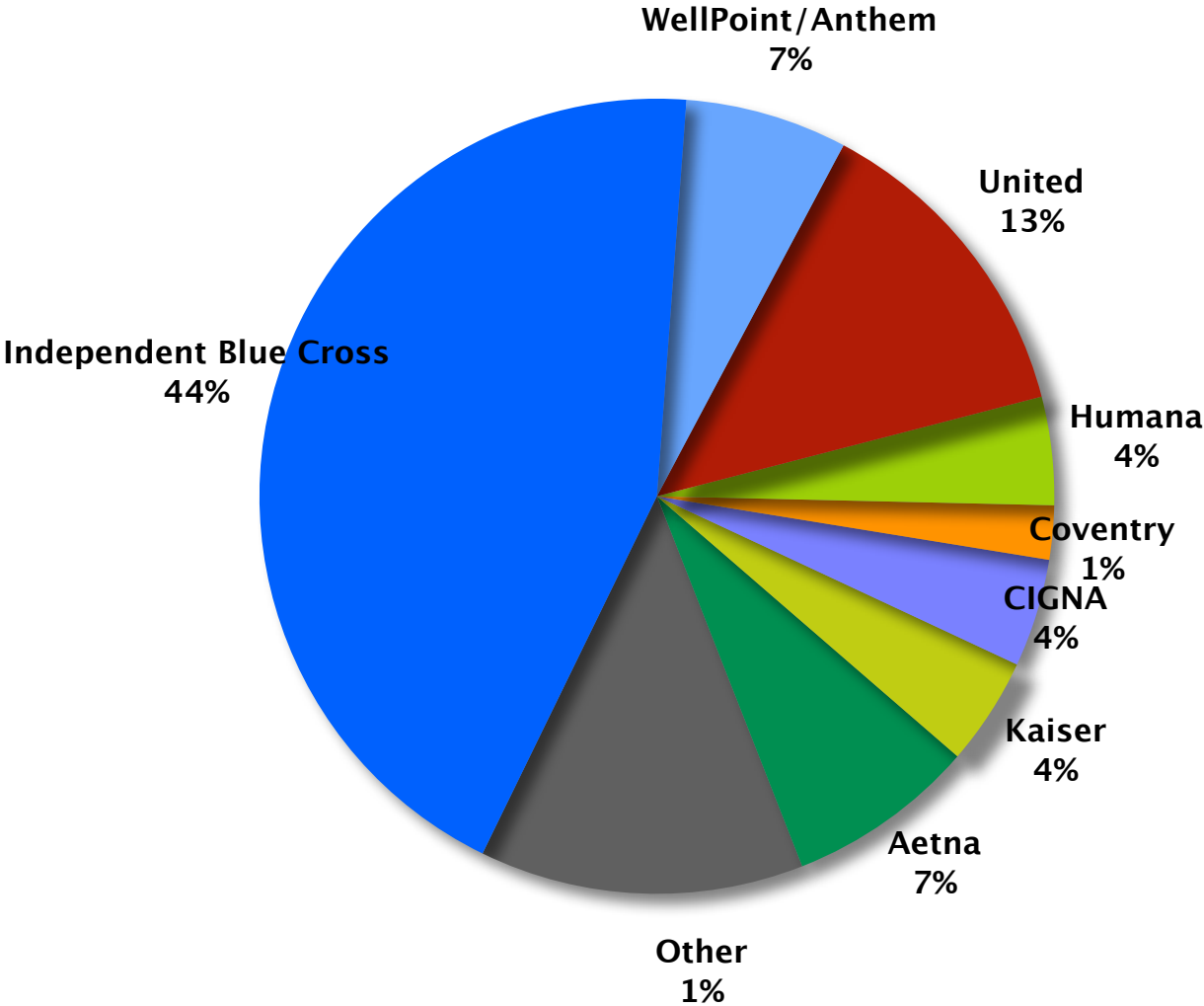
800 interviews were conducted across the country with private health plan members.



How do you get your health insurance coverage?

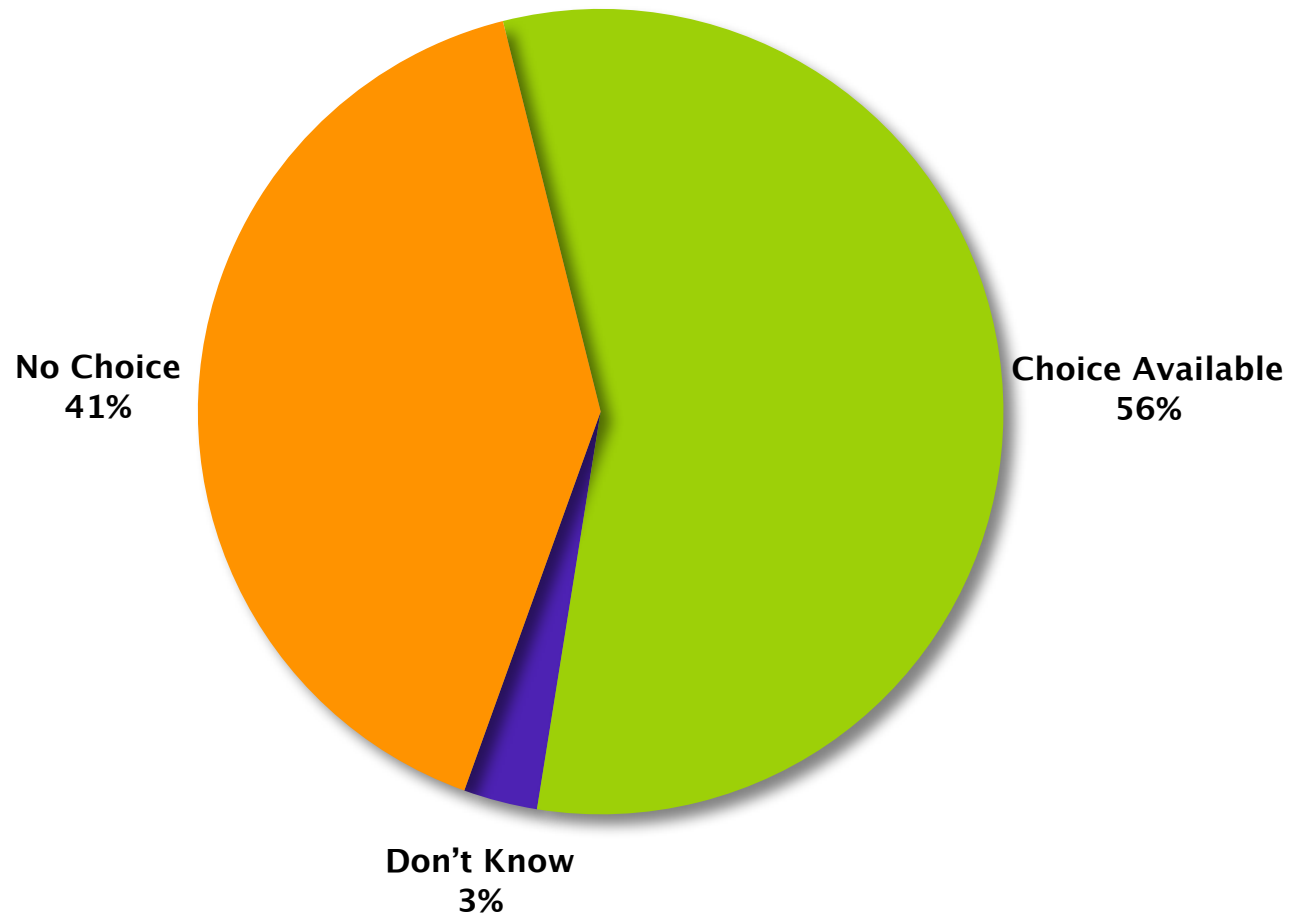


# Payor Providing Coverage





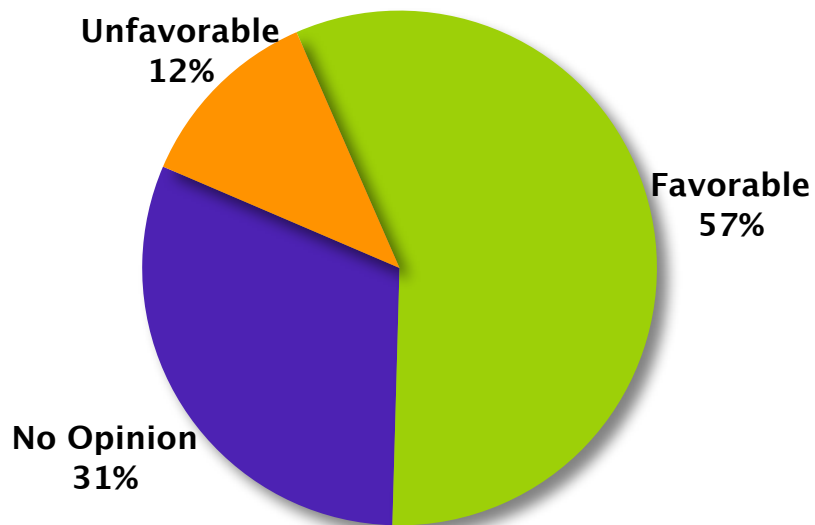
Were you told which health insurance company you would be covered by or did you have a choice of more than one health insurance company from which you could choose for your coverage?



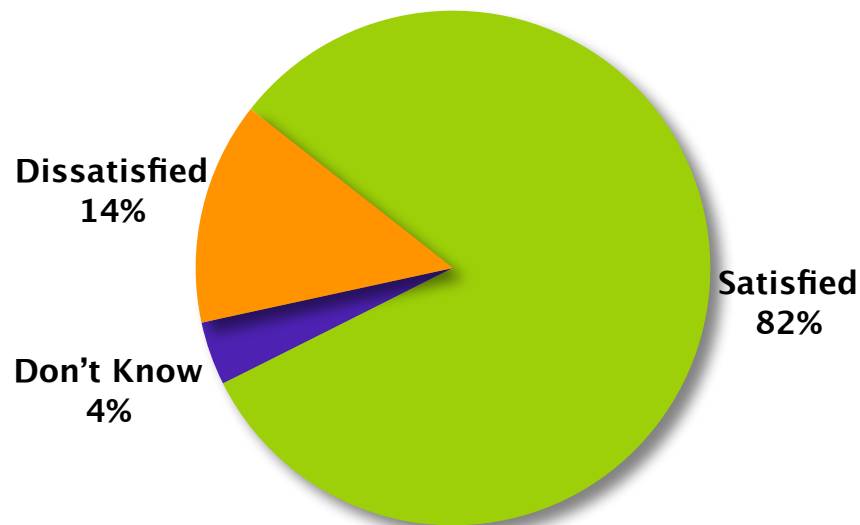
# Reputation and Satisfaction



Do you have a favorable or unfavorable opinion of your current health insurance plan?



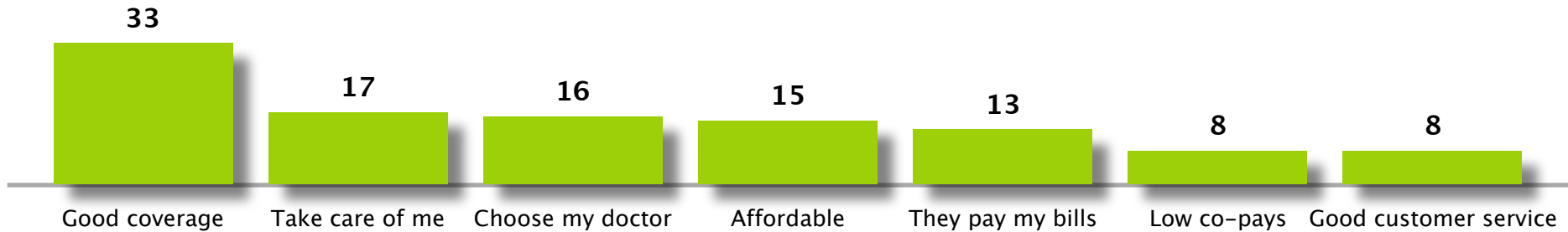
Generally speaking, are you satisfied or dissatisfied with your current health insurance plan?



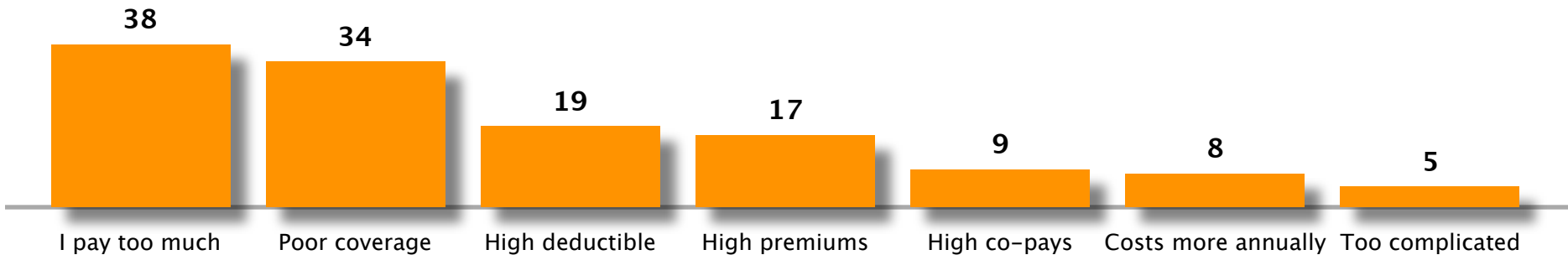
# Reasons for Satisfaction/ Dissatisfaction



ONE OR TWO REASONS WHY YOU ARE SATISFIED WITH YOUR CURRENT HEALTH INSURANCE PLAN



ONE OR TWO REASONS WHY YOU ARE DISSATISFIED WITH YOUR CURRENT HEALTH INSURANCE PLAN



# Your Health Plan is Better Because It's Yours

2010 National Payor Survey

03 . 12 . 2010



Based on what you hear from other people, generally speaking would you say that your health insurance is better, worse, or about the same as other people's health insurance plan?

36% Better

6% Worse

47% Same

11% Don't Know

**6:1 THINK THEIR HEALTH PLAN IS BETTER THAN OTHERS**

# Insurance Doesn't Seem More Difficult to Deal With...



Compared to three years ago, would you say that dealing with your health insurance company has gotten easier, more difficult, or stayed about the same?

10% Easier

14% More Difficult

74% Same

2% Don't Know

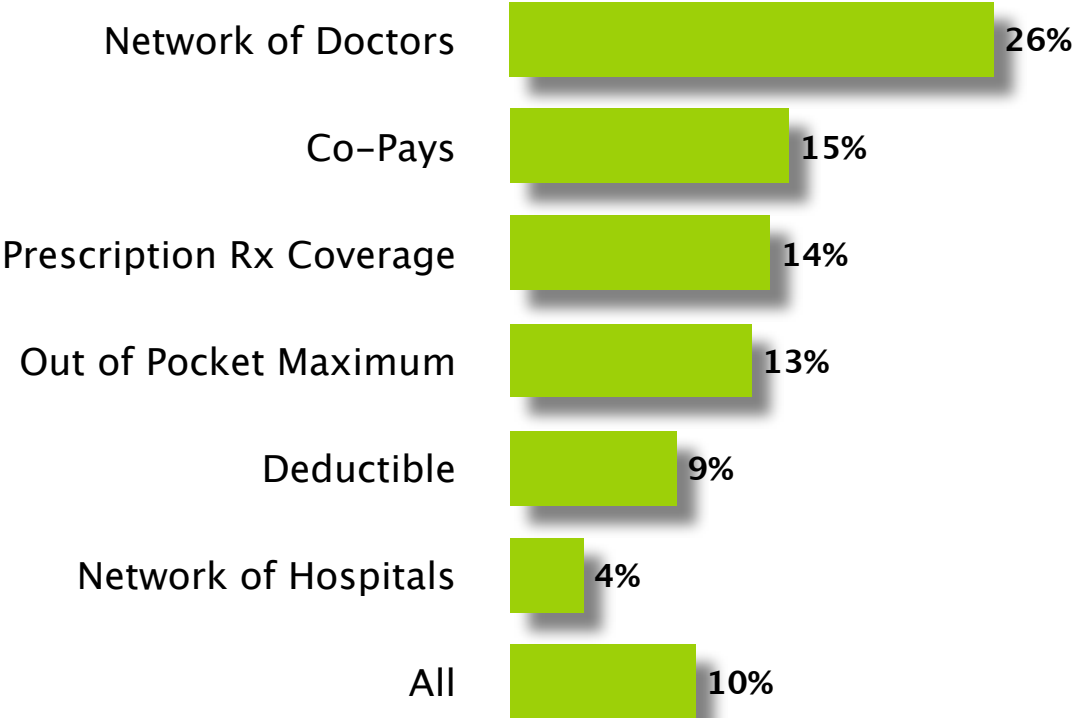
# ...But Everyone Else's is More Difficult to Deal With



Compared to three years ago, do you think that most people with private health insurance have had an easier time, a more difficult time, or has it stayed about the same when dealing with their health insurance company?

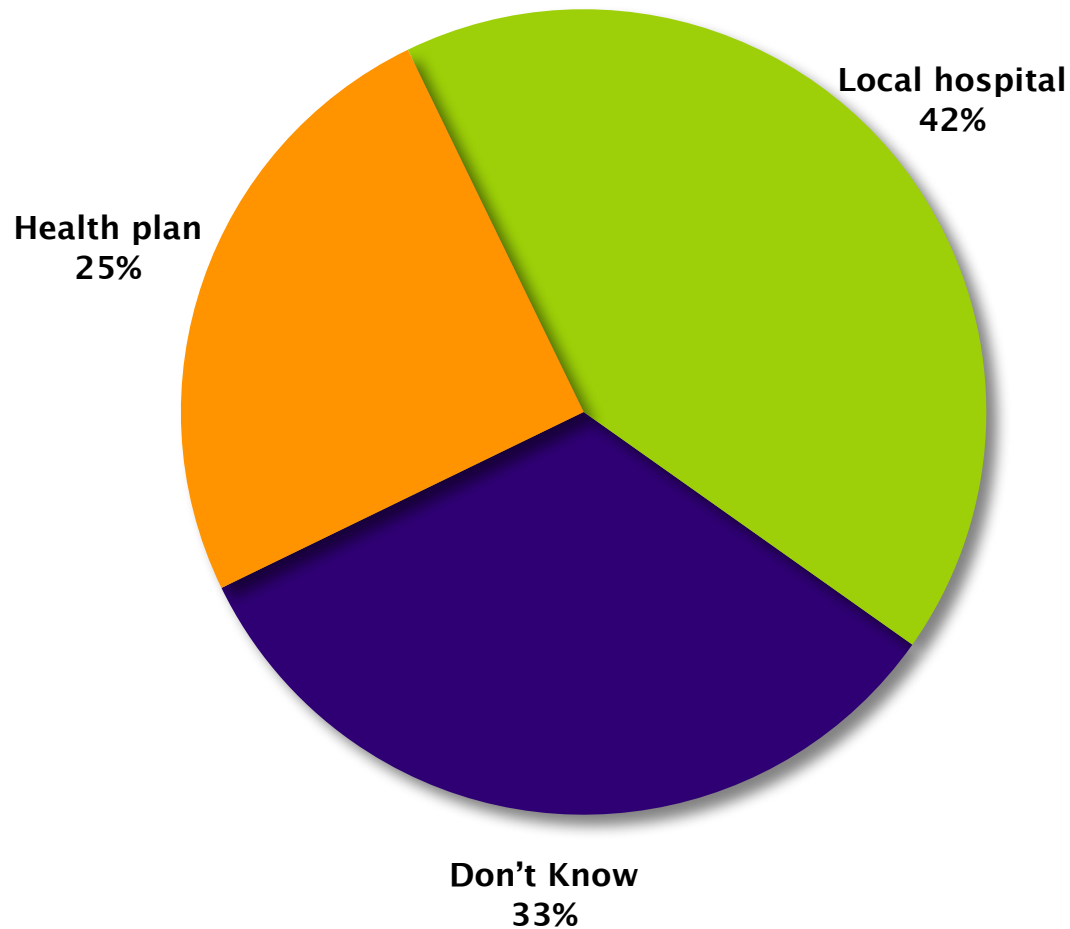
- 5% Easier
- 36% More Difficult
- 38% Same
- 21% Don't Know

# Most Important Features





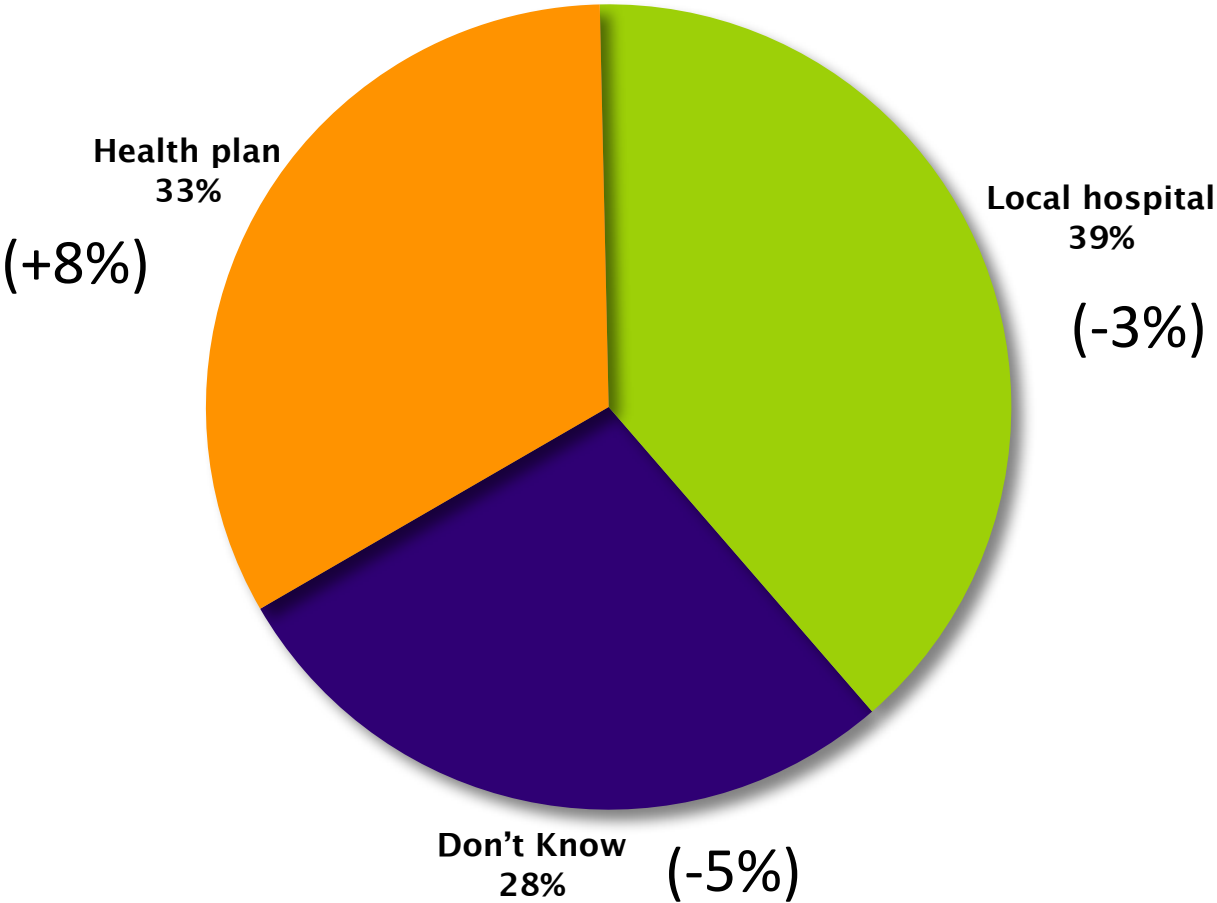
All other things being equal, if there were a dispute between a health insurance company and a local hospital, which would you be MOST likely to side with?



# Picking Sides When It's Your Own Plan



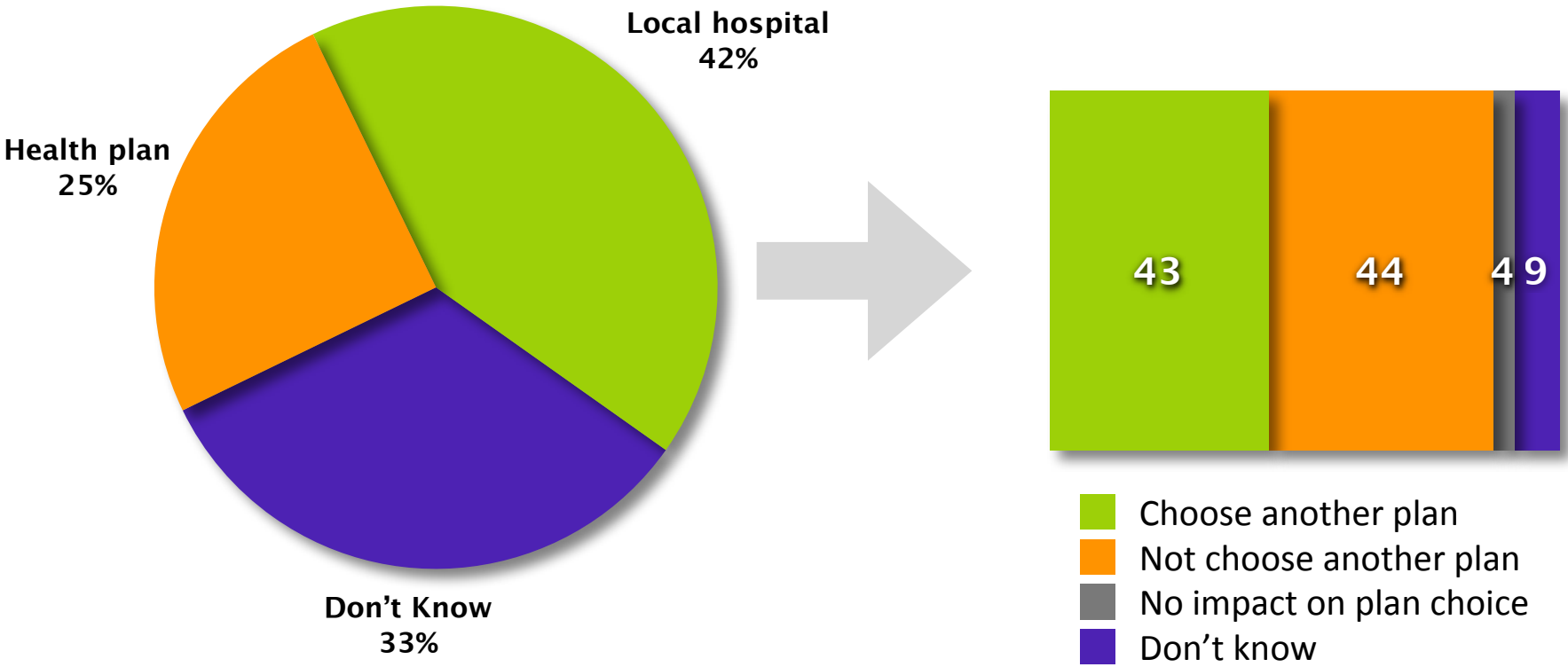
All other things being equal, if there were a dispute between a health insurance company and a local hospital, which would you be MOST likely to side with?



# Picking Sides When Your Choice Really Matters

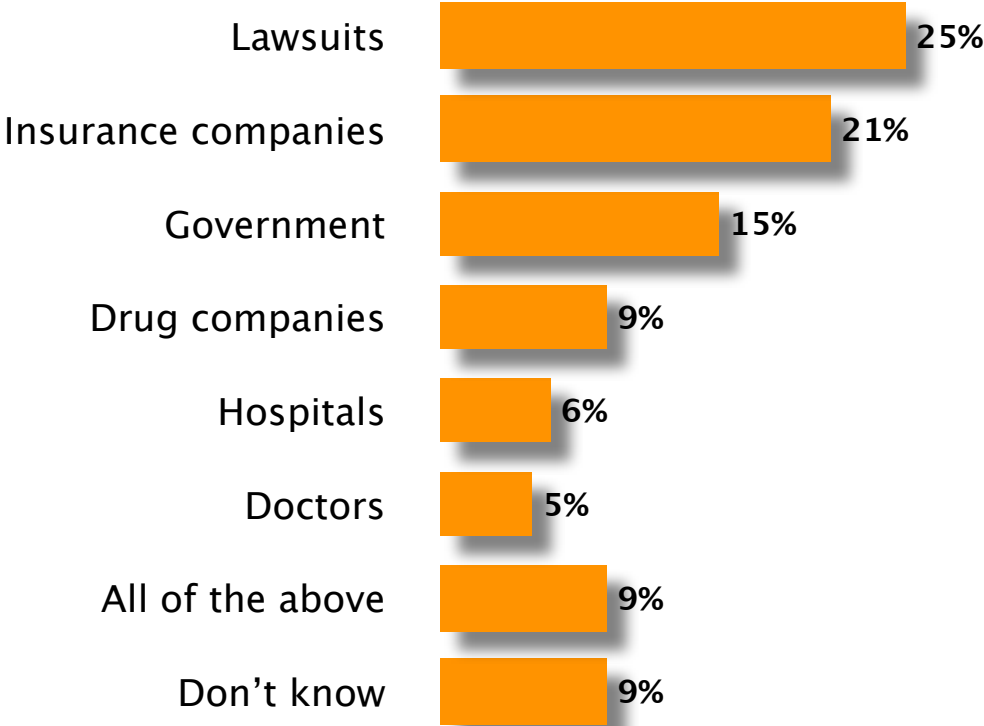


If your favorite hospital were not available  
or a part of your health insurance plan,  
would that make you choose another  
health plan?





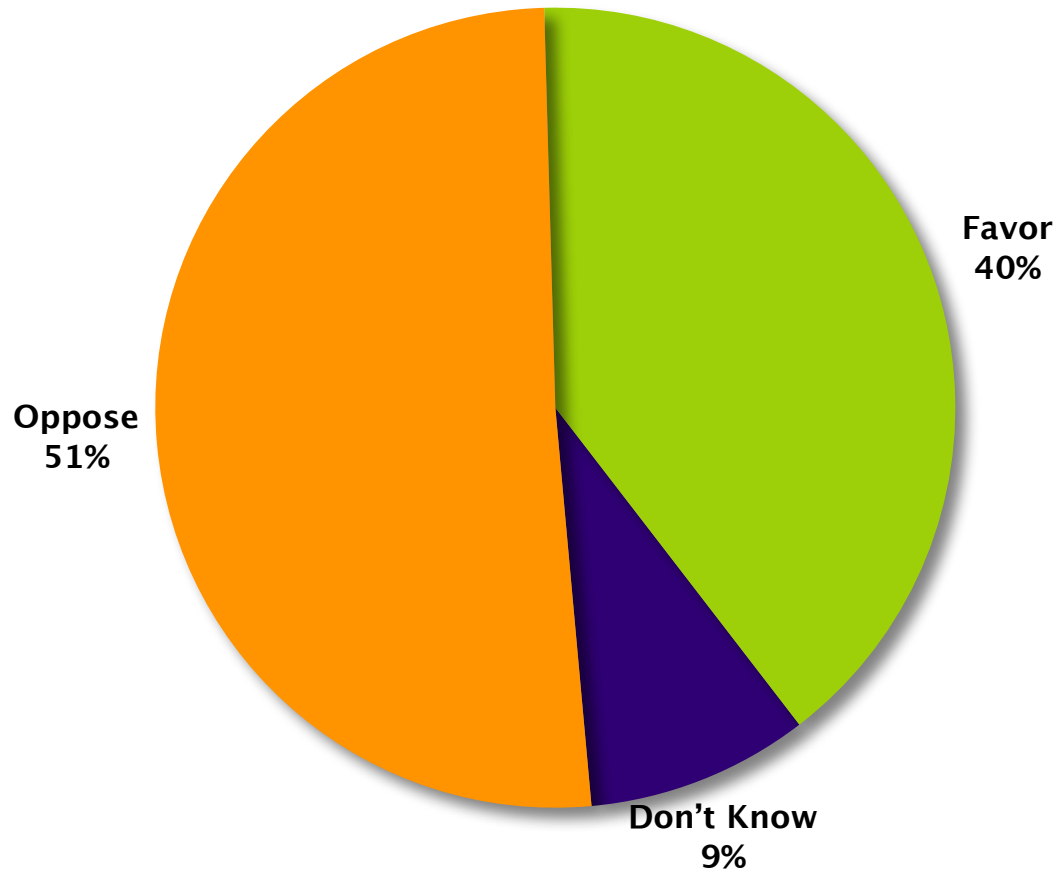
Which of the following is MOST responsible for the increasing cost of health insurance premiums?



# Health Reform and the Public Option



Would you favor or oppose having the government create a new government health insurance plan to compete with private health insurance plans?

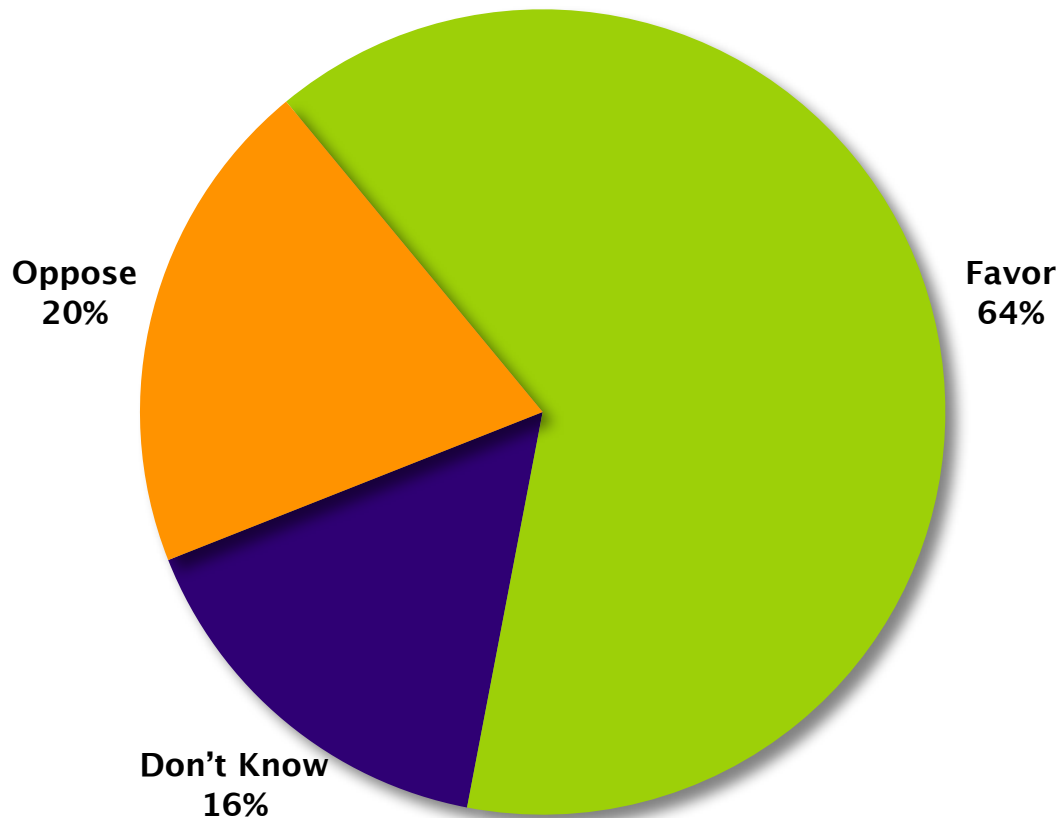


**PEOPLE WHO ARE STRONGLY OPPOSED  
OUTNUMBER STRONGLY FAVOR BY 2:1 MARGIN**

# Health Reform and the MLR Minimum



Would you favor or oppose requiring health insurance companies to spend a certain percentage of every premium dollar on actual care, rather than profit or bureaucracy?





For each statement I'd like you to rate how accurately that statement describes health insurance companies in general. The statements will be ranked on a scale of 1 to 10 with 1 meaning the statement is not at all accurate and 10 meaning the statement is extremely accurate.

