

2022 State of the Provider Network Market

Zelis Network Analytics



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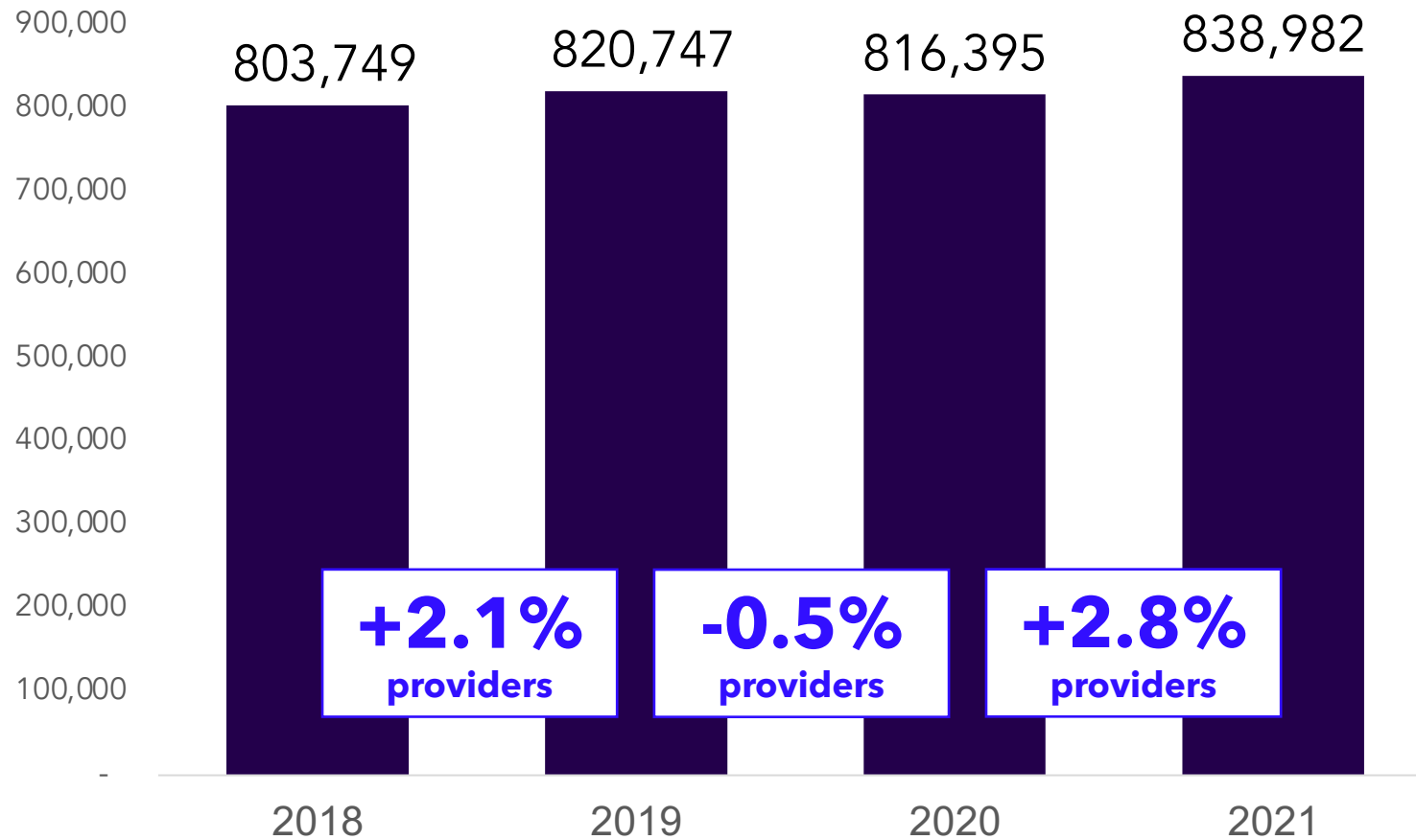
Let's Get Started!



Medical

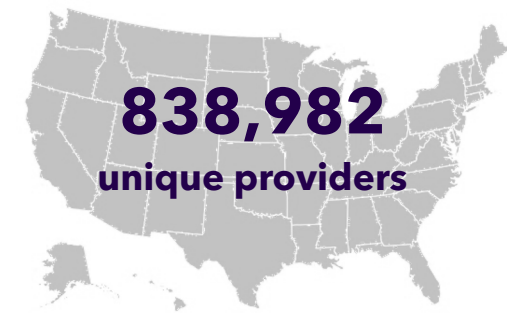


Medical Provider Universe

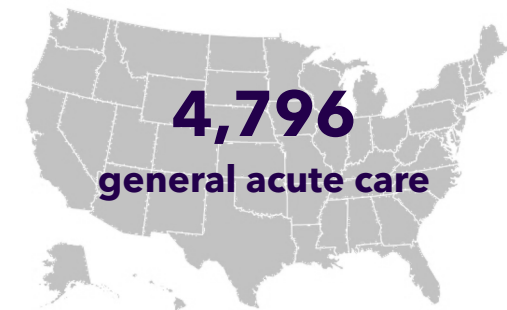


Our medical market includes MDs and DOs, contracted with at least one health plan in the US to determine the unique count of physicians in the US.

All Medical Providers



Hospitals



Medical Provider Universe

PCPs



413,124

primary care
physicians

MDs



757,362

doctor of
medicine

MEDICAL PROVIDERS



838,982

unique providers

SCPs



504,672

specialist care
providers

DOs



86,534

doctor of osteopathic
medicine

HOSPITALS

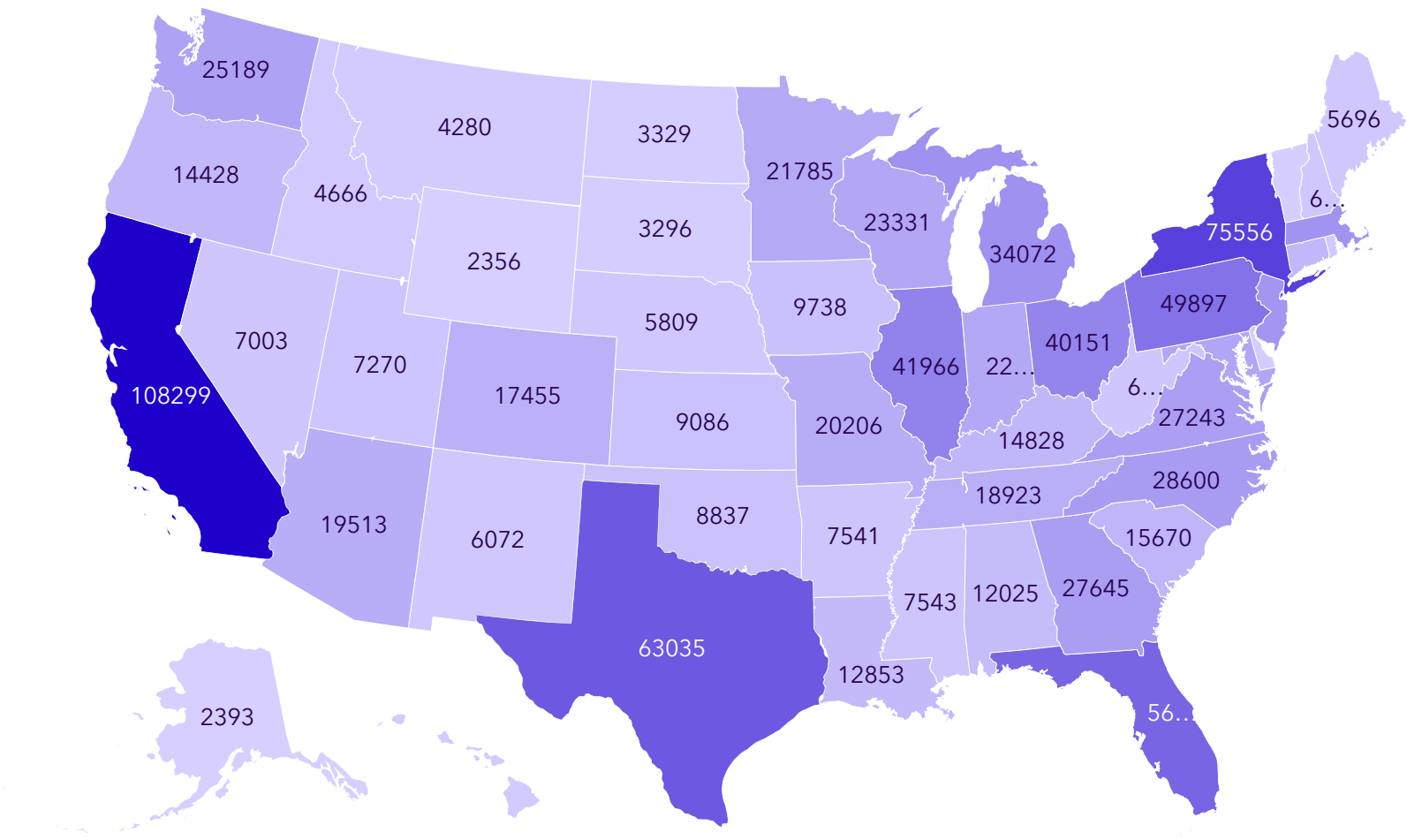


4,796

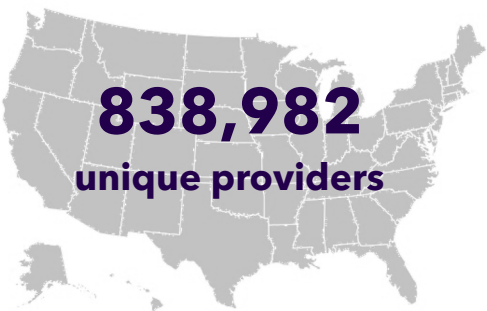
general acute care

Our medical market includes MDs and DOs, contracted with at least one health plan in the US to determine the unique count of physicians in the US.

Physician Counts by State: MDs and DOs



All Medical Providers



TOP



108,299
California

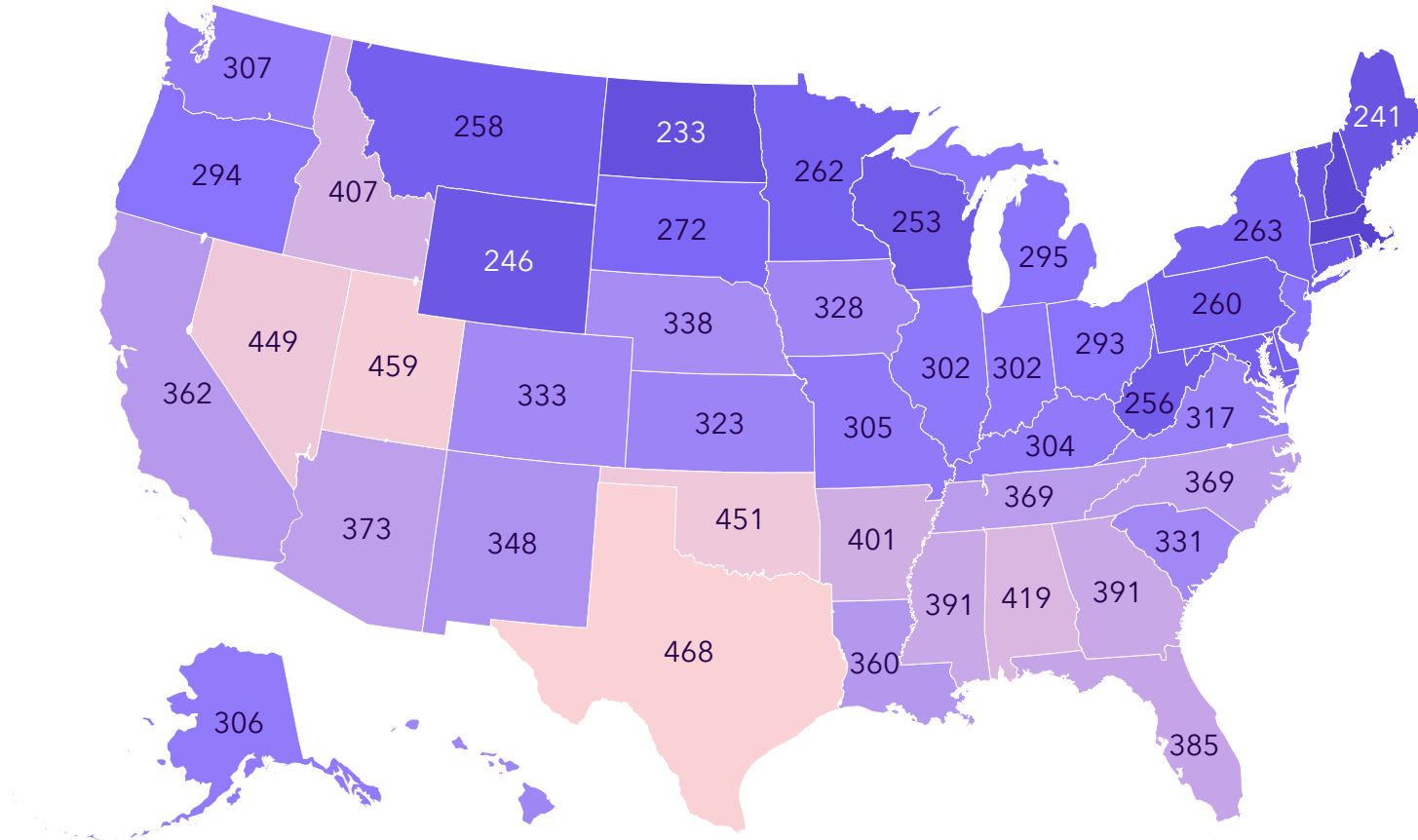
BOTTOM



2,356
Wyoming

Physician Supply

The number of people to each individual provider: 1 provider to X people in state



US Census: State Population Totals and Components of Change: 2020-2021

All Medical Providers



TOP

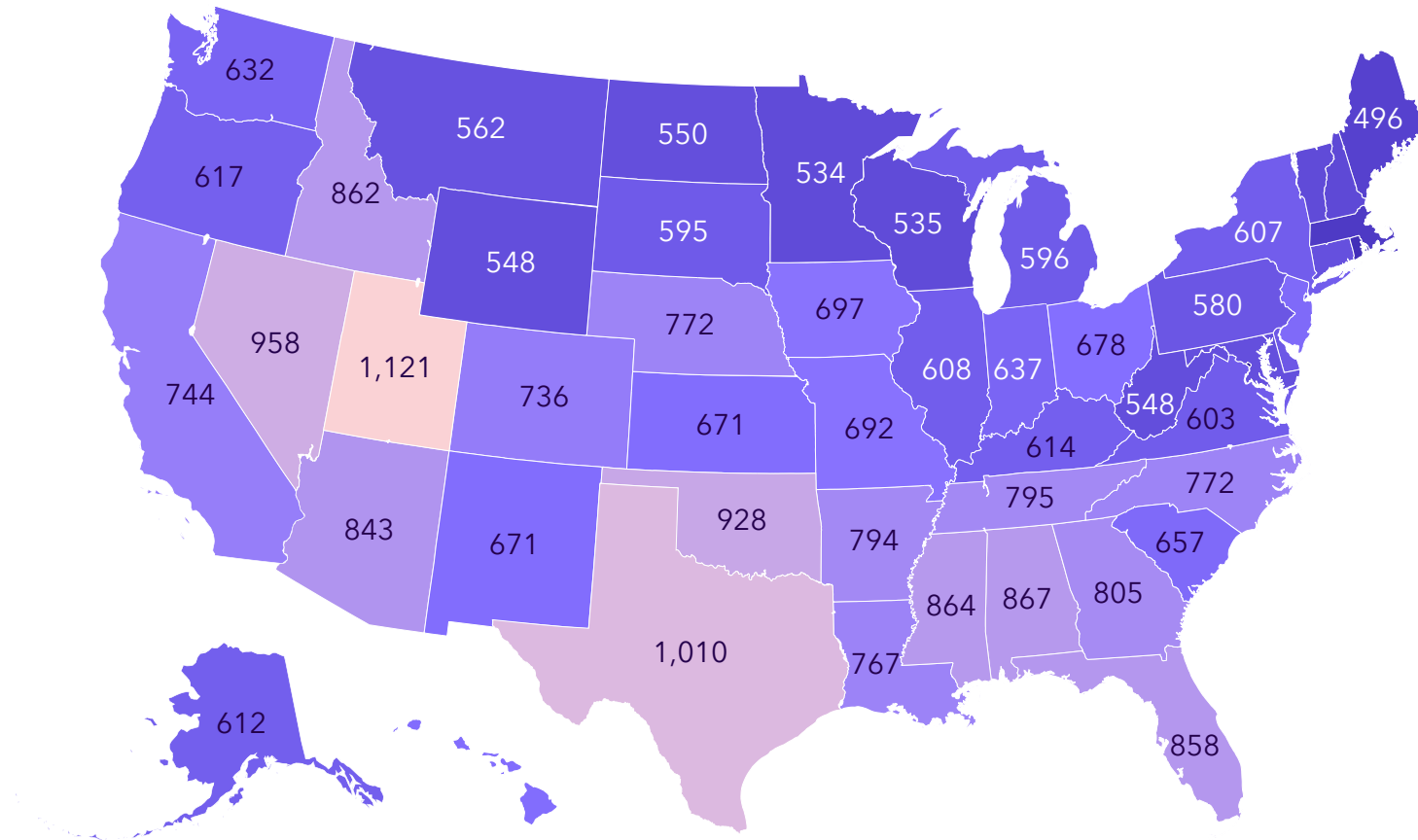
1:100
Washington DC
1:213
Massachusetts
1:220
Rhode Island

BOTTOM

1:468
Texas
1:459
Utah
1:451
Oklahoma

Physician Supply: Primary Care Providers

The number of people to each individual provider: 1 provider to X people in state



US Census: State Population Totals and Components of Change: 2020-2021

All Primary Care Providers



TOP

1:234

Washington DC

1:417

Rhode Island

1:465

Massachusetts

BOTTOM

1:1,121

Utah

1:1010

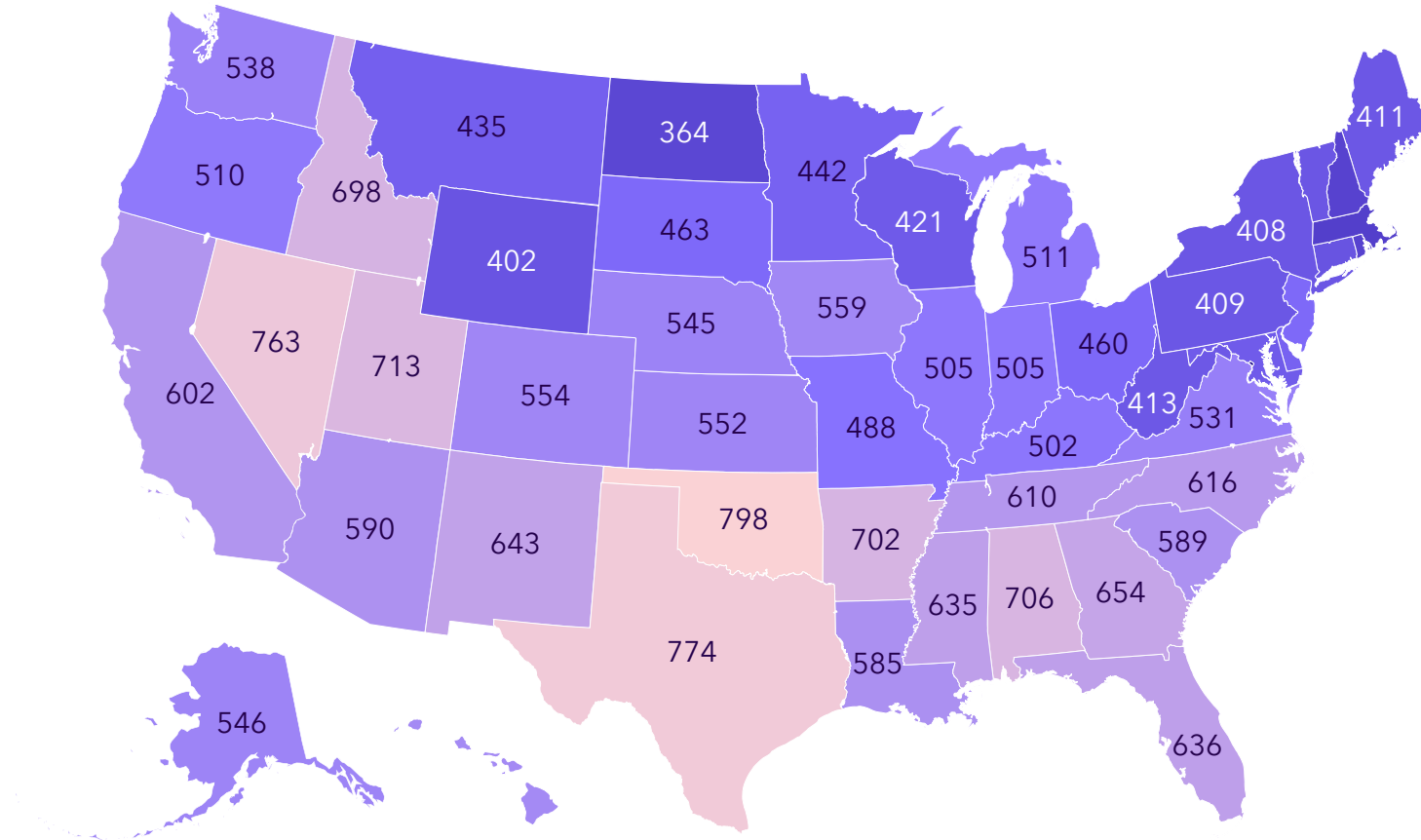
Texas

1:958

Nevada

Physician Supply: Specialist Providers

The number of people to each individual provider: 1 provider to X people in state



US Census: State Population Totals and Components of Change: 2020-2021

All Specialist Care Providers



TOP

1:161

Washington DC

1:341

Massachusetts

1:351

Rhode Island

BOTTOM

1:798

Oklahoma

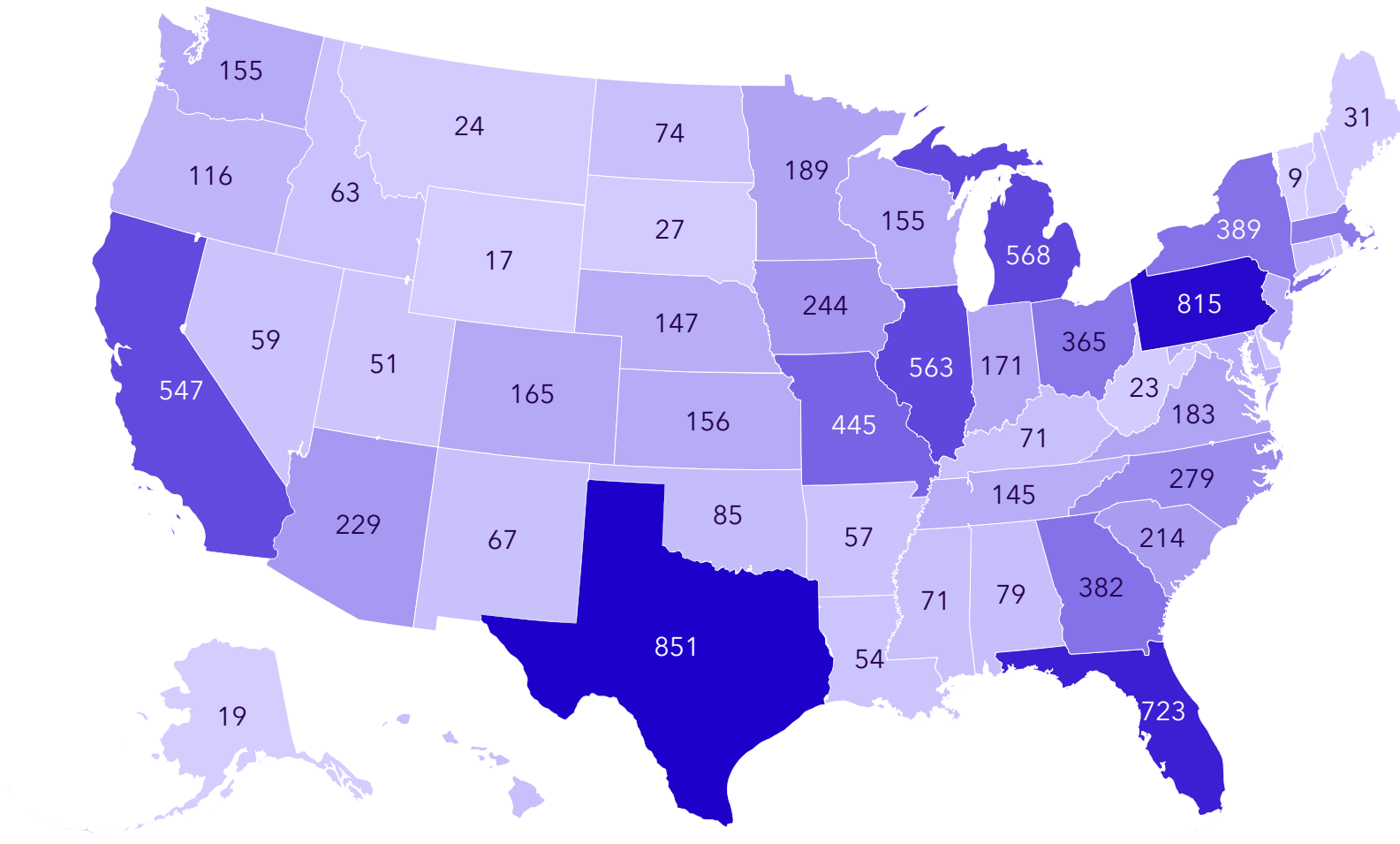
1:774

Texas

1:763

Nevada

New Providers: Primary Care & Specialists

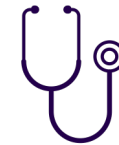


All Medical Providers

+10k

**new unique providers
contracted with a
managed care plan**

PCPs



+3,135
primary care
physicians

SCPs

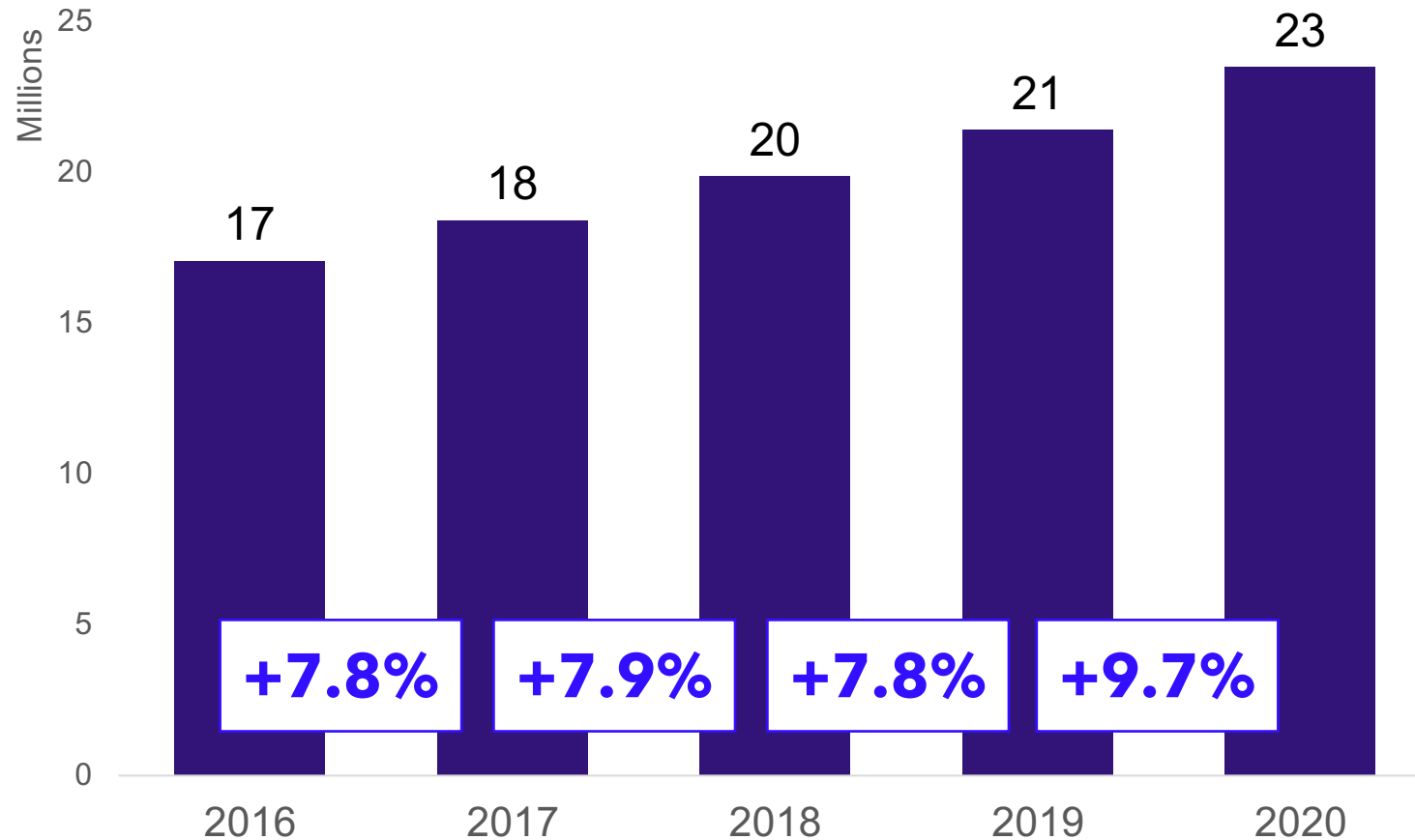


+6,940
specialist care
providers

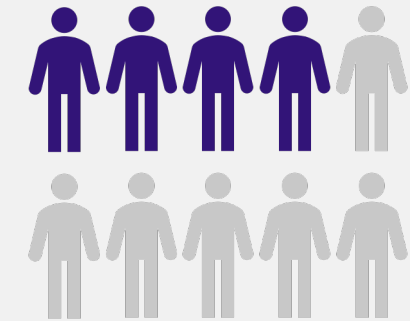
Medicare



Medicare Advantage Enrollment

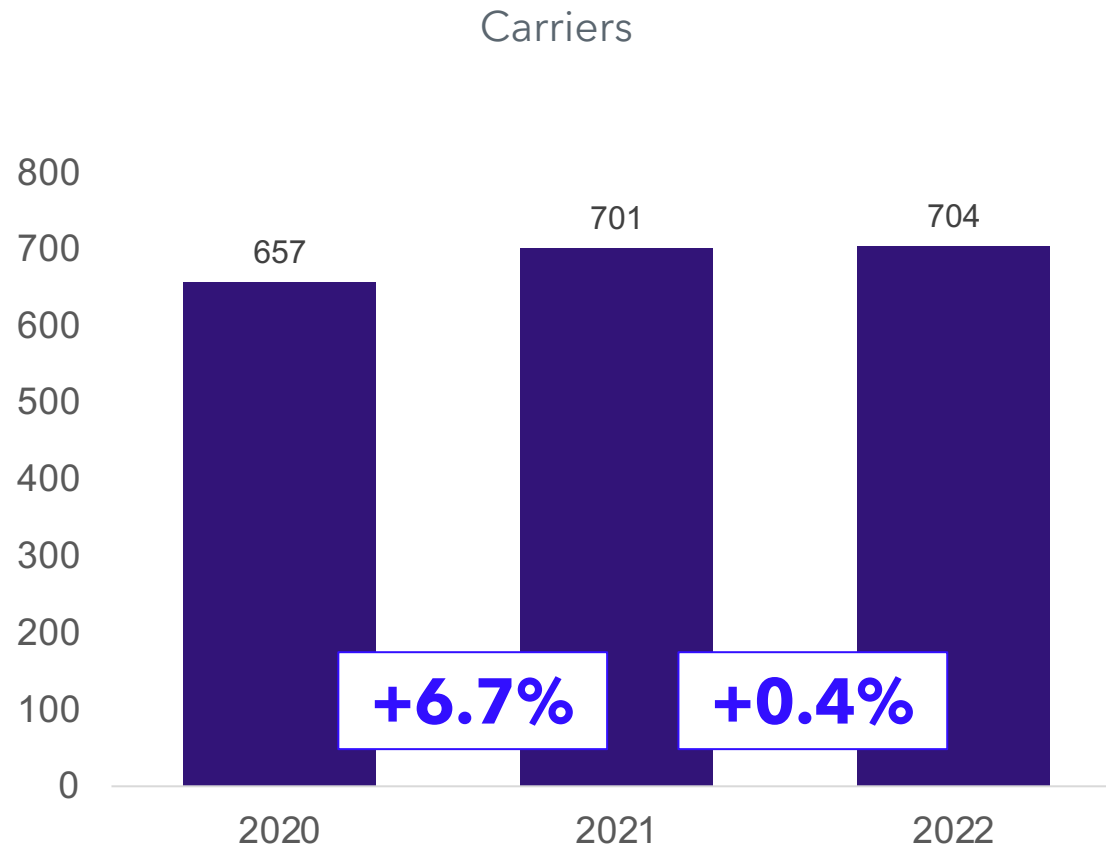


source: <https://www.kff.org/state-category/medicare/medicare-enrollment/>



**4 in 10 Medicare
beneficiaries are
enrolled in a Medicare
Advantage plan**

Medicare Advantage Participation: Medicare Advantage Organizations



unique carrier = organization marketing name at state level

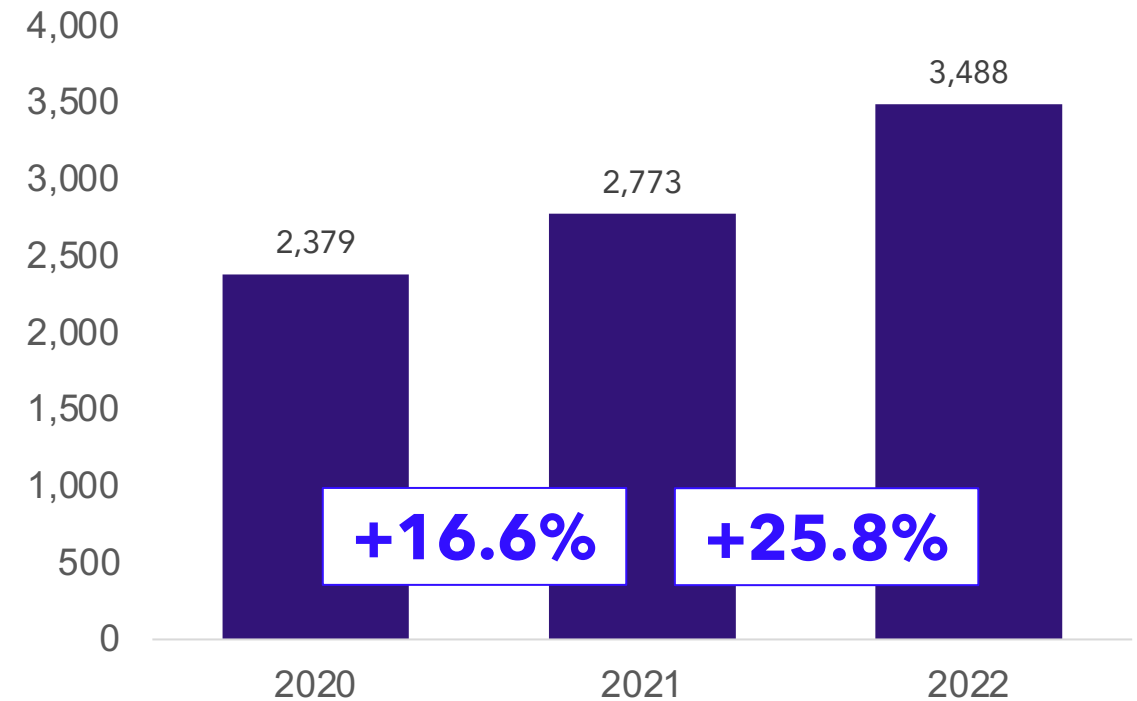
**MAOs are
expanding their
service areas**

Medicare Advantage Participation: Networks

715

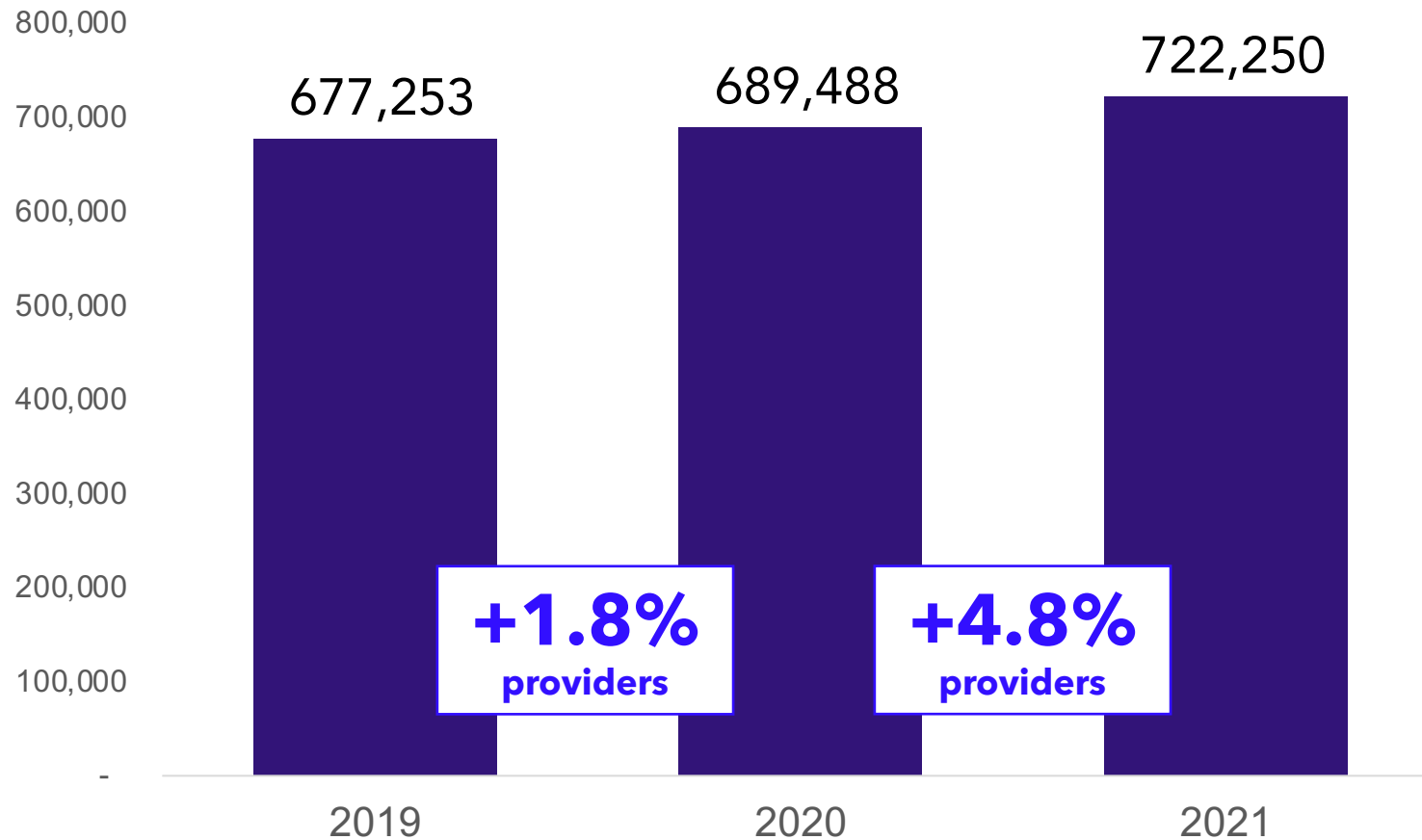
new Medicare
Advantage networks
offered by MAOs

Networks



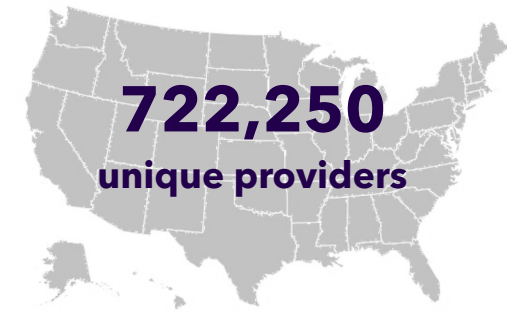
unique network = MAO network name and plan type at state level

Medicare Advantage Provider Universe

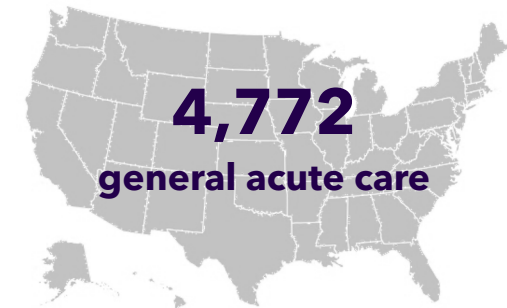


Our Medicare Advantage market includes MDs and DOs, contracted with at least one Medicare managed care organization in the US to determine the unique count of physicians in the US.

All Medical Providers



Hospitals



Medicare Advantage Provider Universe

PCPs



304,470

primary care
physicians

MDs



646,789

doctor of
medicine

MEDICAL PROVIDERS



722,250

unique providers

SCPs



459,965

specialist care
providers

DOs



77,712

doctor of osteopathic
medicine

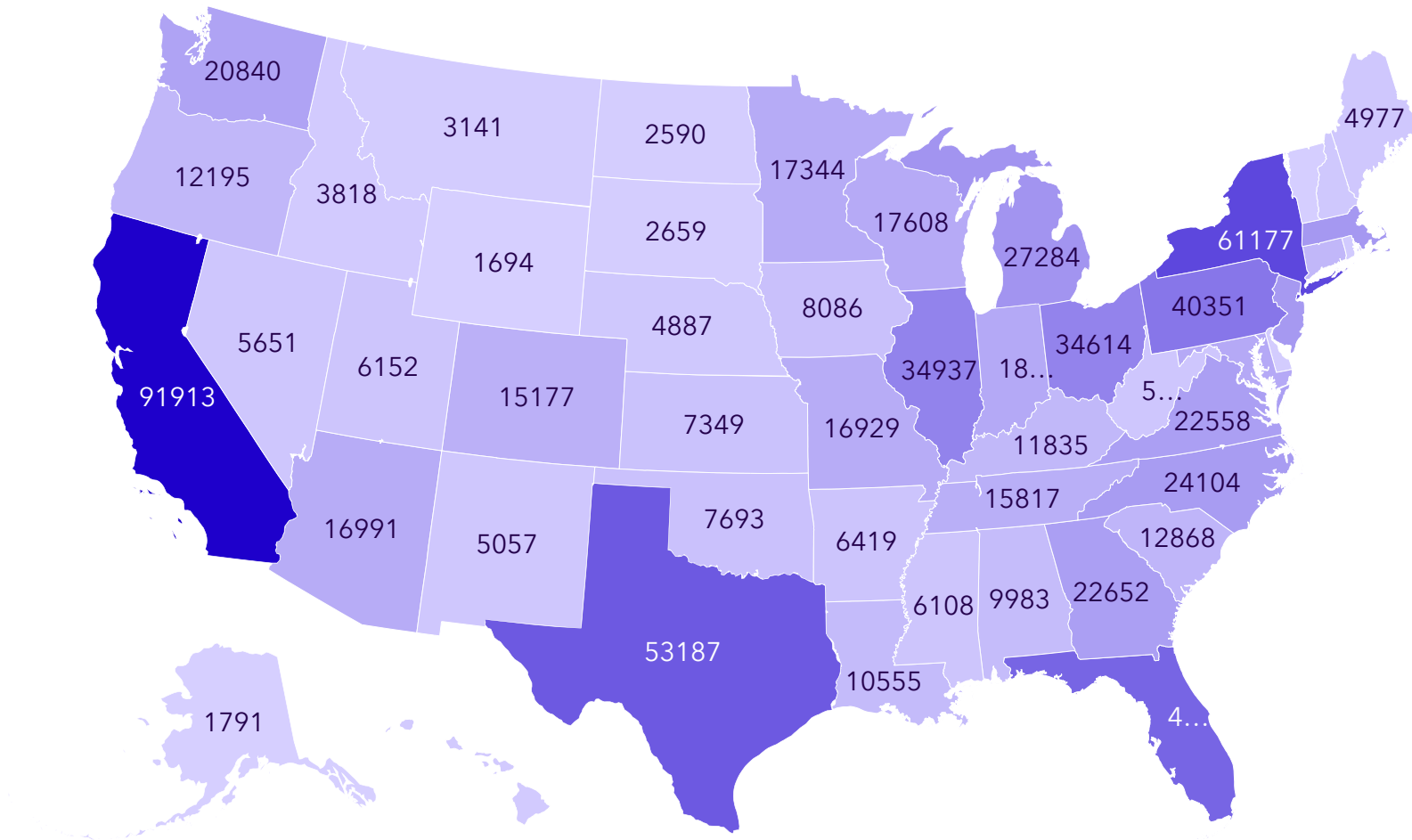
HOSPITALS



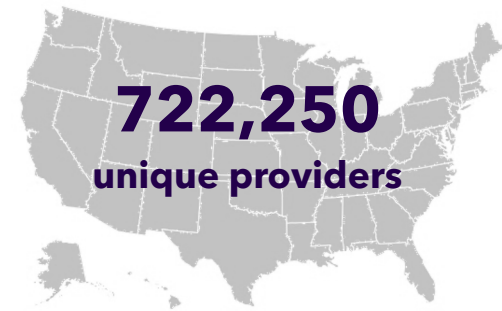
4,772

general acute care

Medicare Advantage Physician Counts by State: MDs and DOs



All Medicare Providers



TOP



91,913

California

BOTTOM

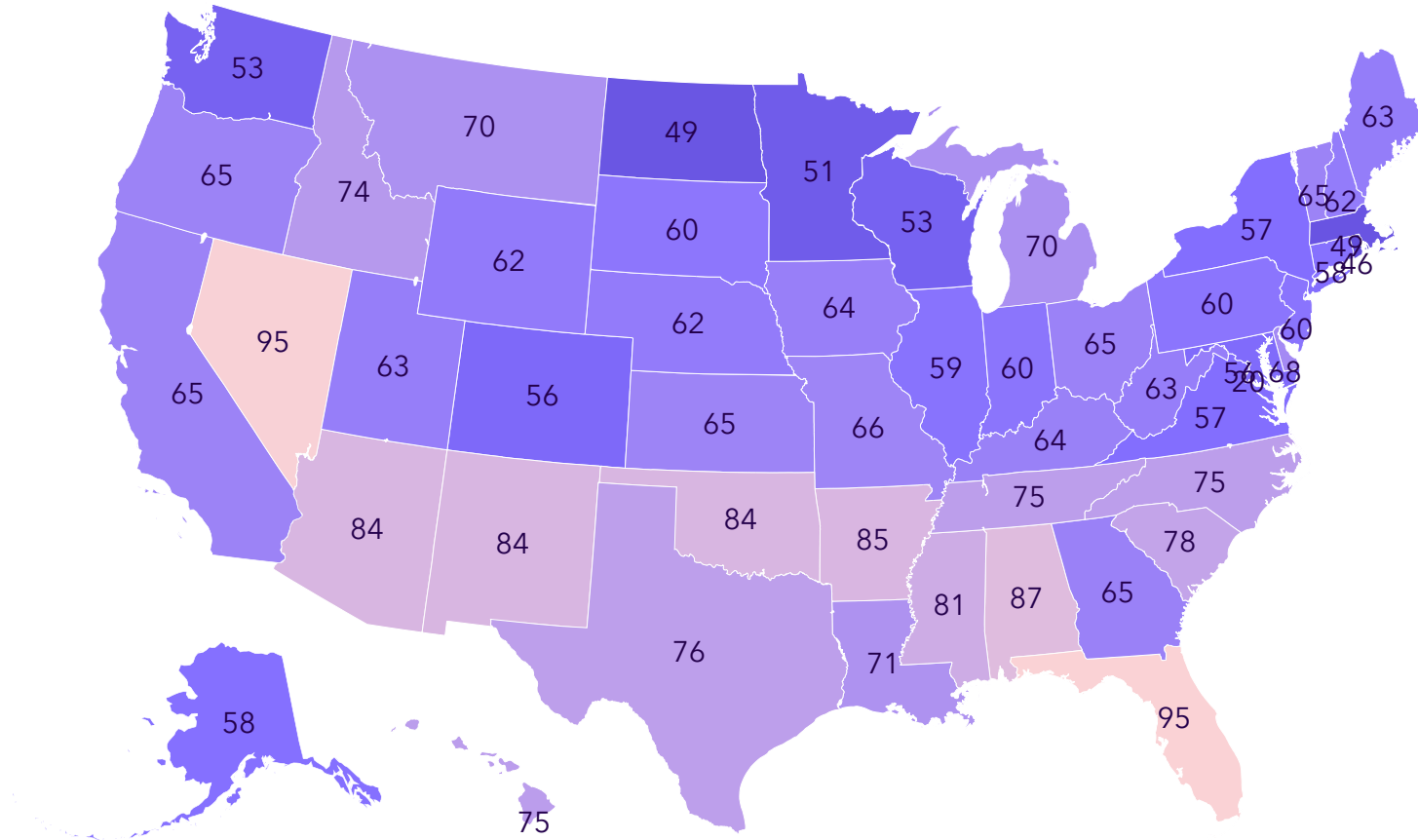


1,694

Wyoming

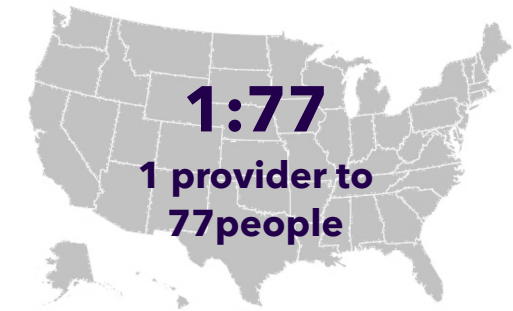
Physician Supply: Medicare Advantage

The number of people to each individual provider: 1 provider to X people in state



US Census: State Population Totals and Components of Change: 2020-2021

All Medical Providers



PCPs



1:183

primary care
physicians

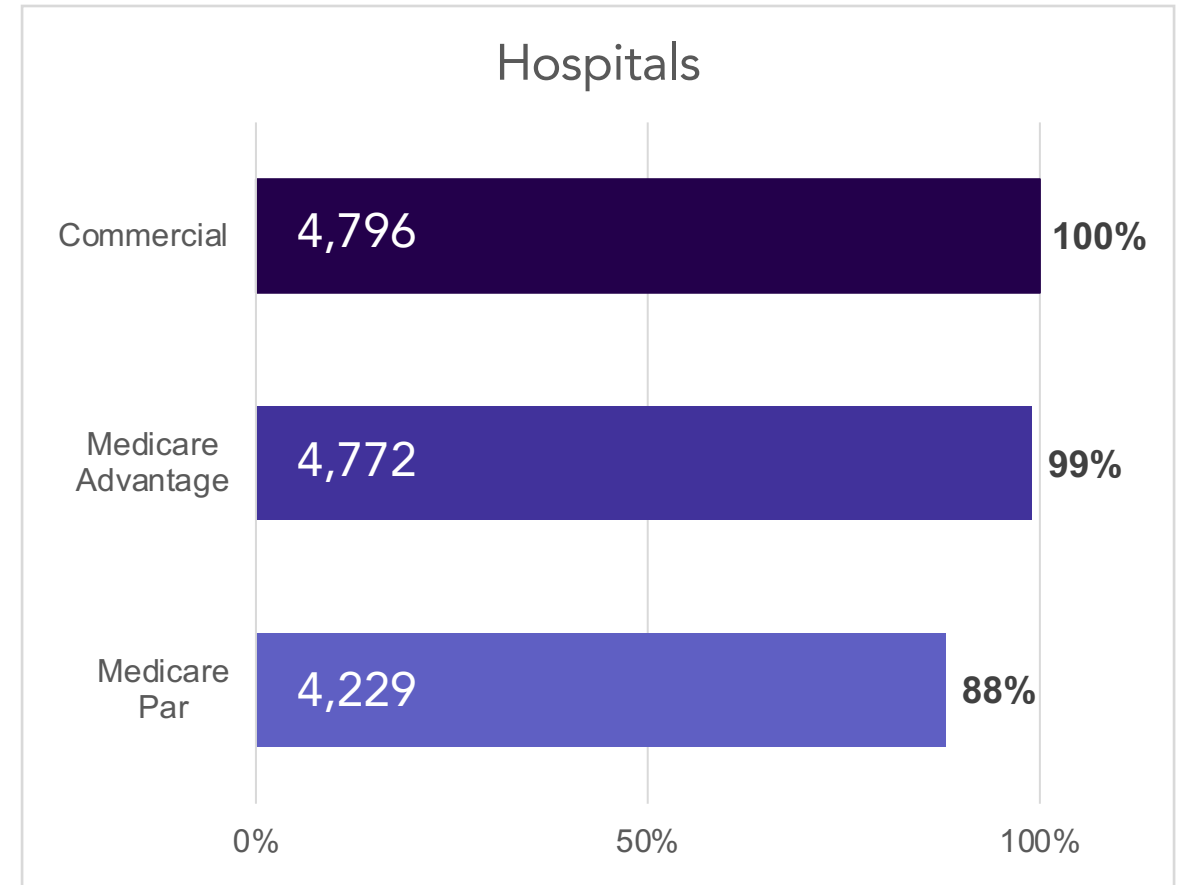
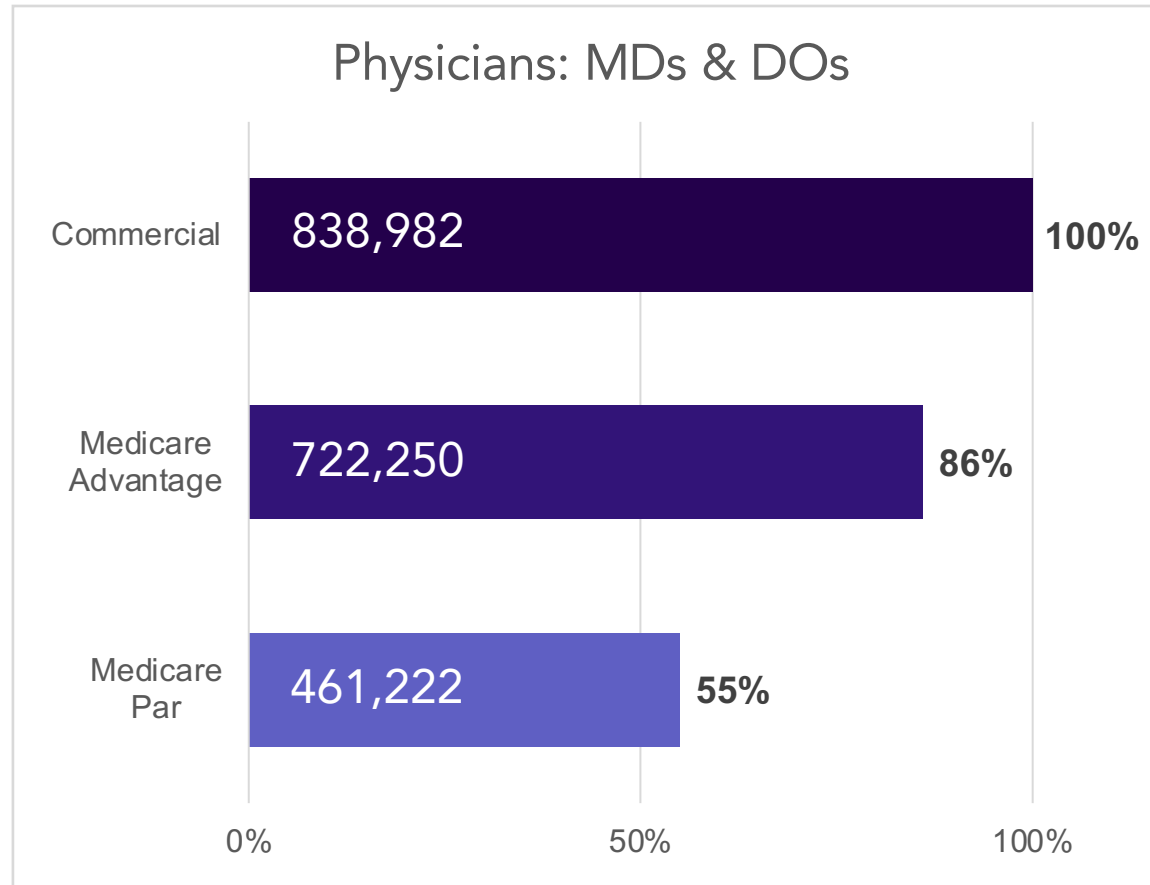
SCPs



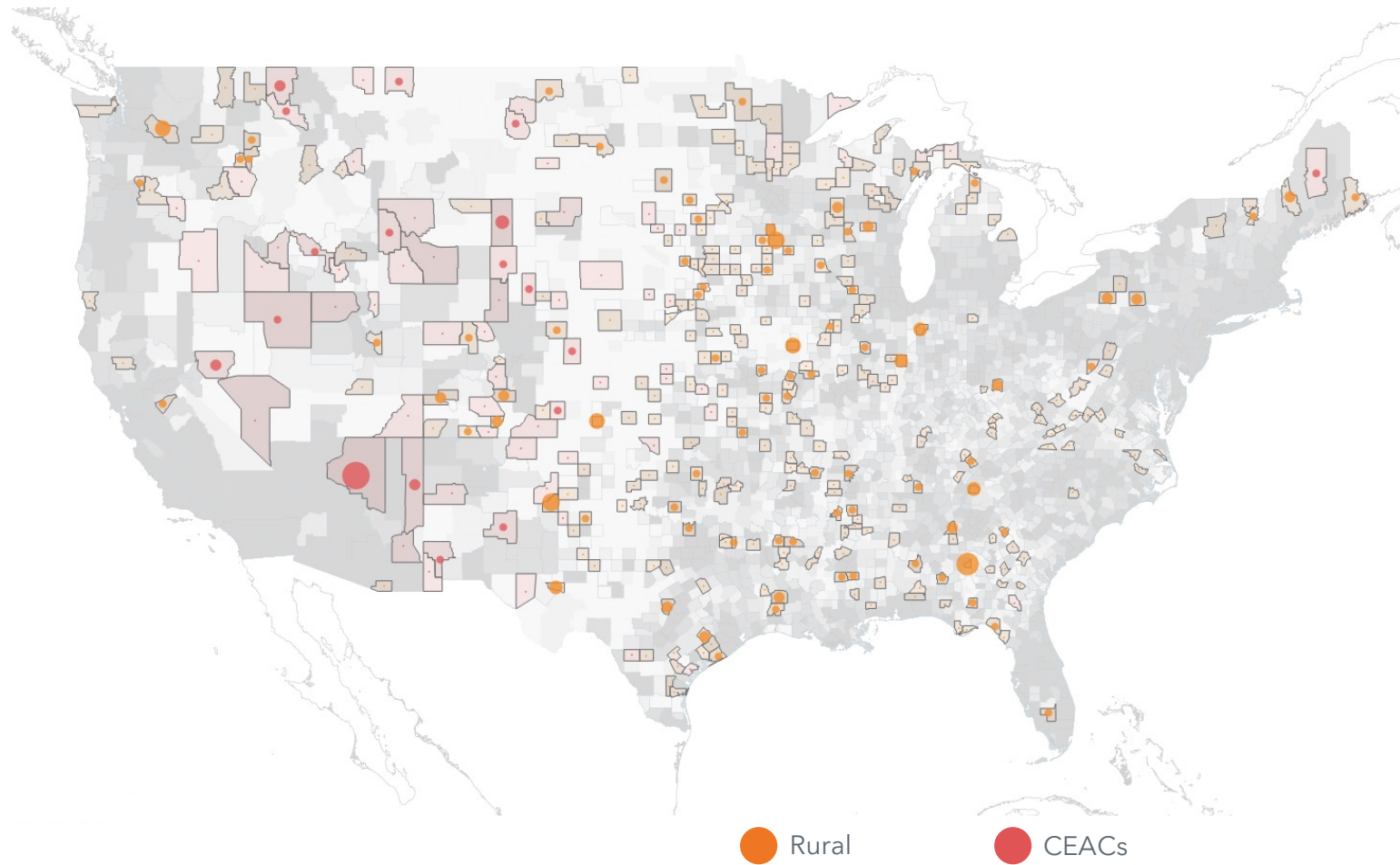
1:121

specialist care
providers

Physician Count Comparison: Commercial and Medicare



New Providers: Primary Care & Specialists



2021 New Physician Count

+239

new NPI AND contracted with a plan

Rural Counties

192
providers

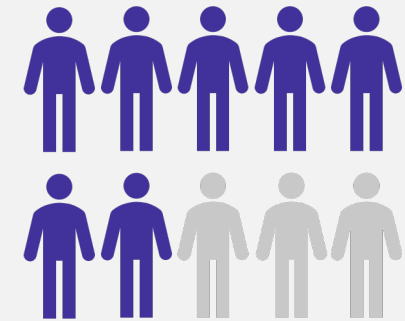
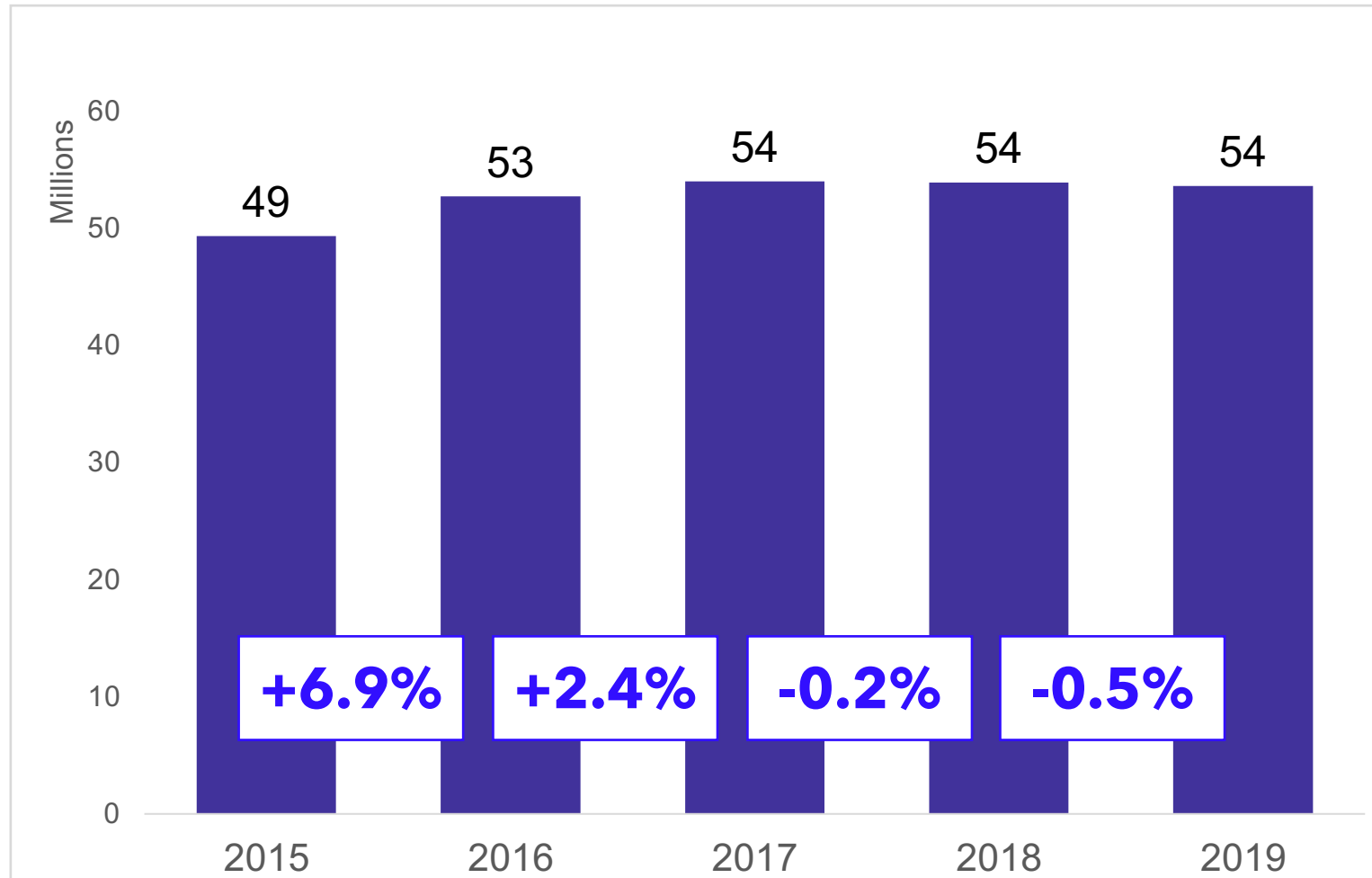
CEAC Counties

47
providers

Medicaid

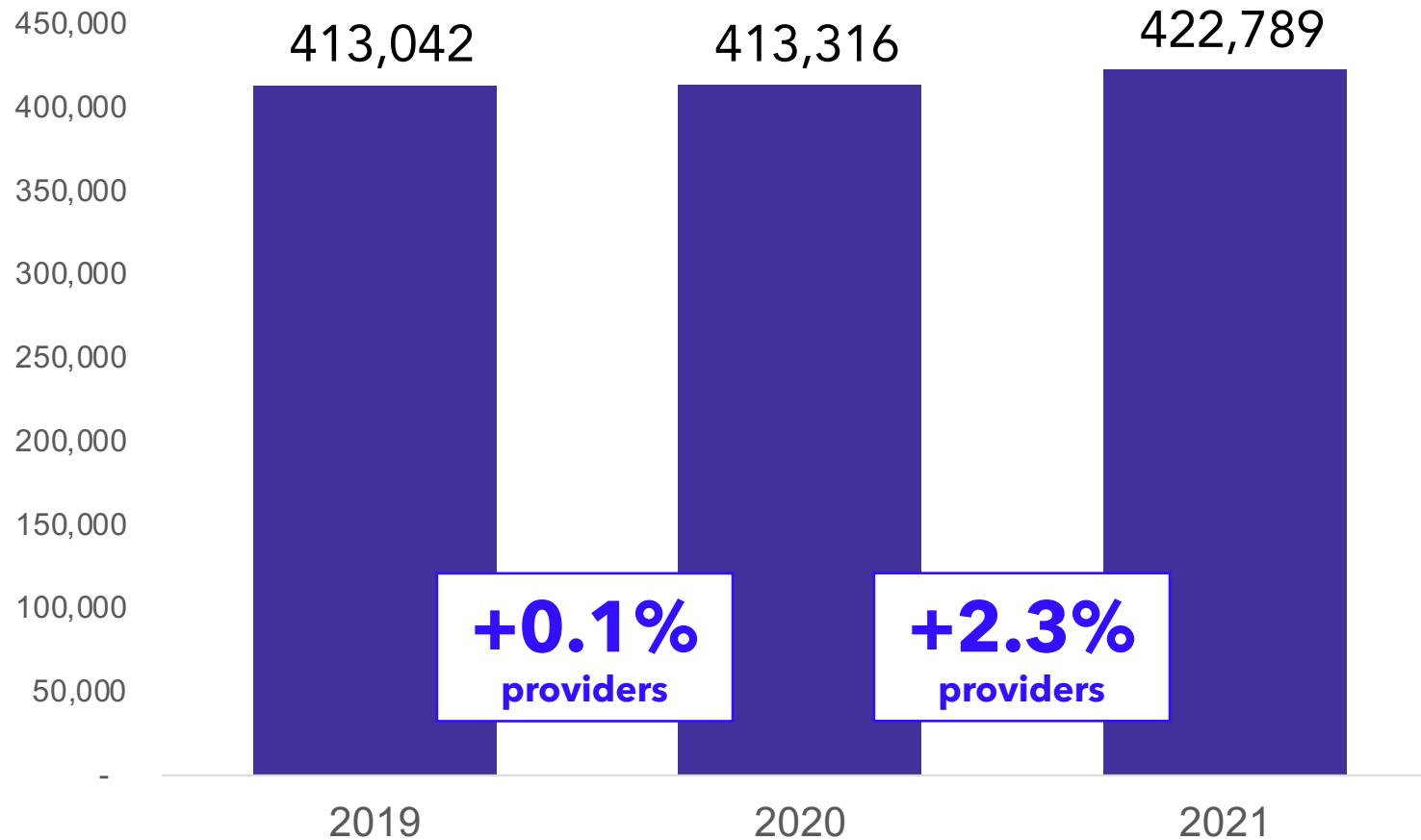


Managed Medicaid Enrollment



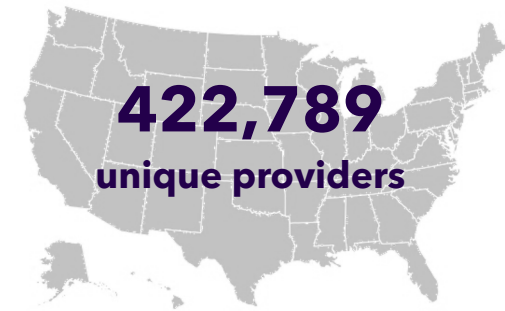
**Nearly 7 in 10
Medicaid beneficiaries
are enrolled in a
Managed Medicaid plan**

Managed Medicaid Provider Universe

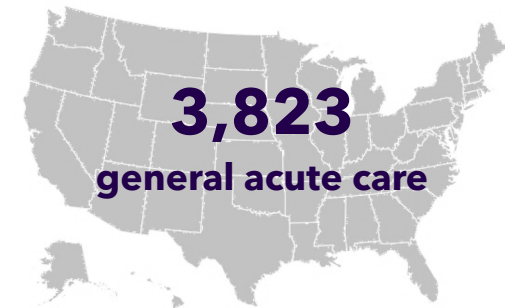


Our Medicaid market includes MDs and DOs, contracted with at least one Medicaid managed care organization in the US to determine the unique count of physicians in the US.

All Medical Providers



Hospitals



Ten states do not have Managed Medicaid programs:
Alabama, Arkansas, Connecticut, Idaho, Maine, Montana,
Oklahoma, South Dakota, Vermont, and Wyoming.

Managed Medicaid Provider Universe

PCPs



224,020

primary care
physicians

MDs



381,821

doctor of
medicine

MEDICAL PROVIDERS



422,789

unique providers

SCPs



213,223

specialist care
providers

DOs



40,968

doctor of osteopathic
medicine

HOSPITALS



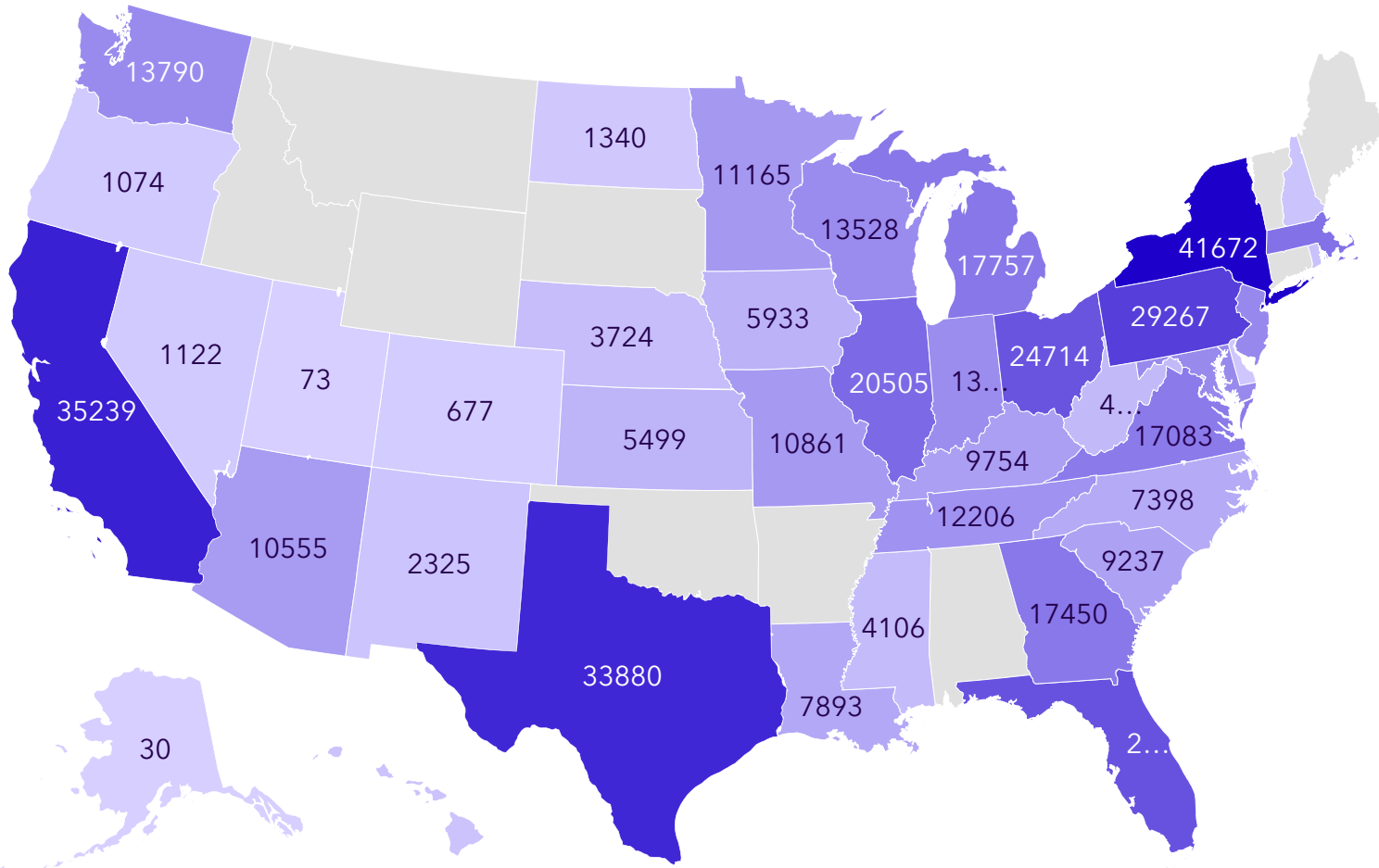
3,823

general acute care

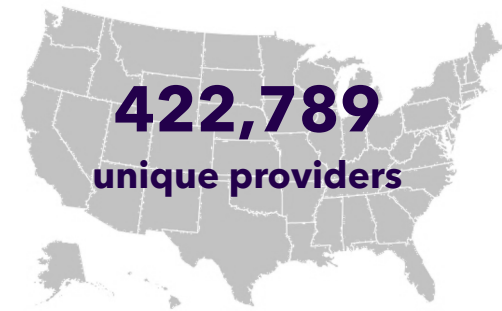
Our Medicaid market includes MDs and DOs, contracted with at least one Medicaid managed care organization in the US to determine the unique count of physicians in the US.

Ten states do not have Managed Medicaid programs:
Alabama, Arkansas, Connecticut, Idaho, Maine, Montana,
Oklahoma, South Dakota, Vermont, and Wyoming.

Managed Medicaid Physician Counts by State: MDs and DOs



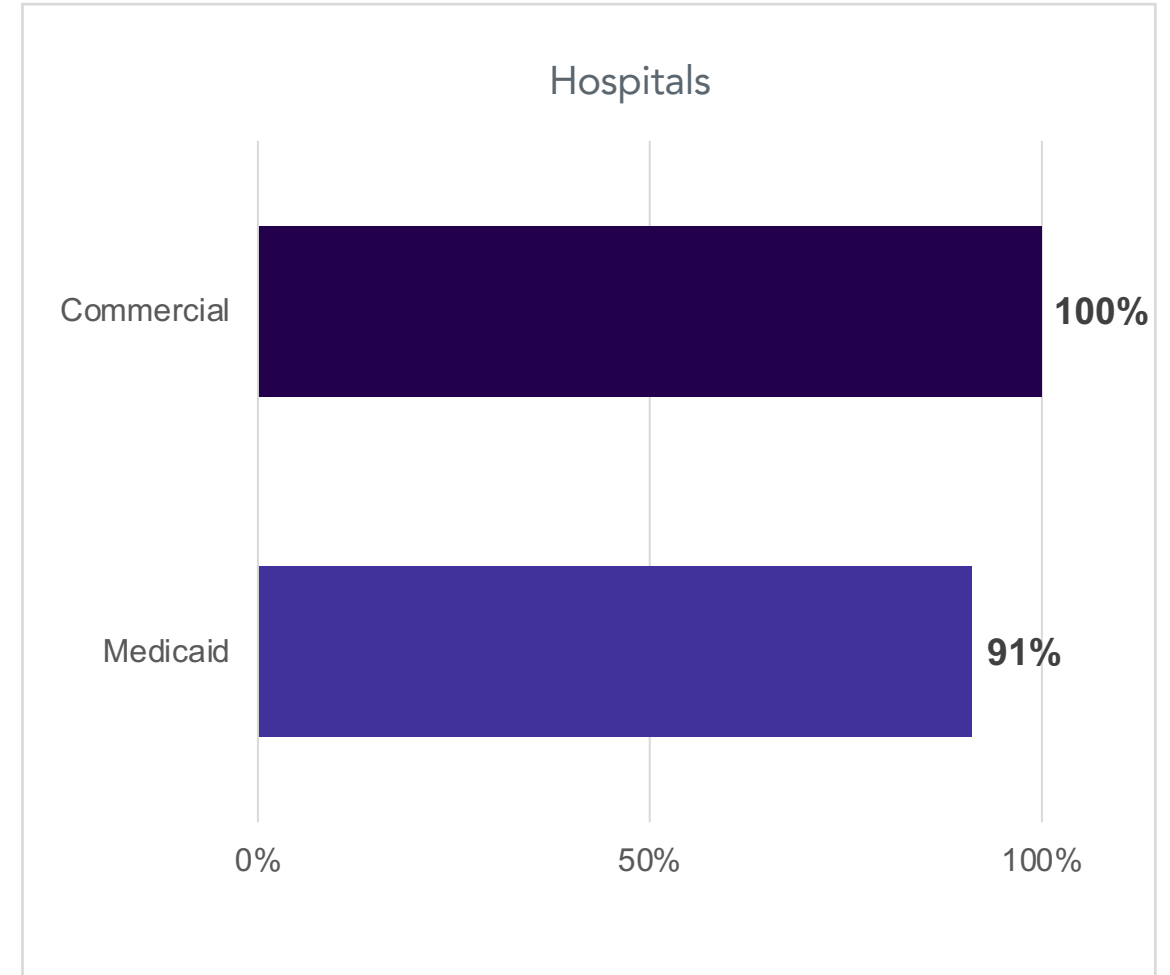
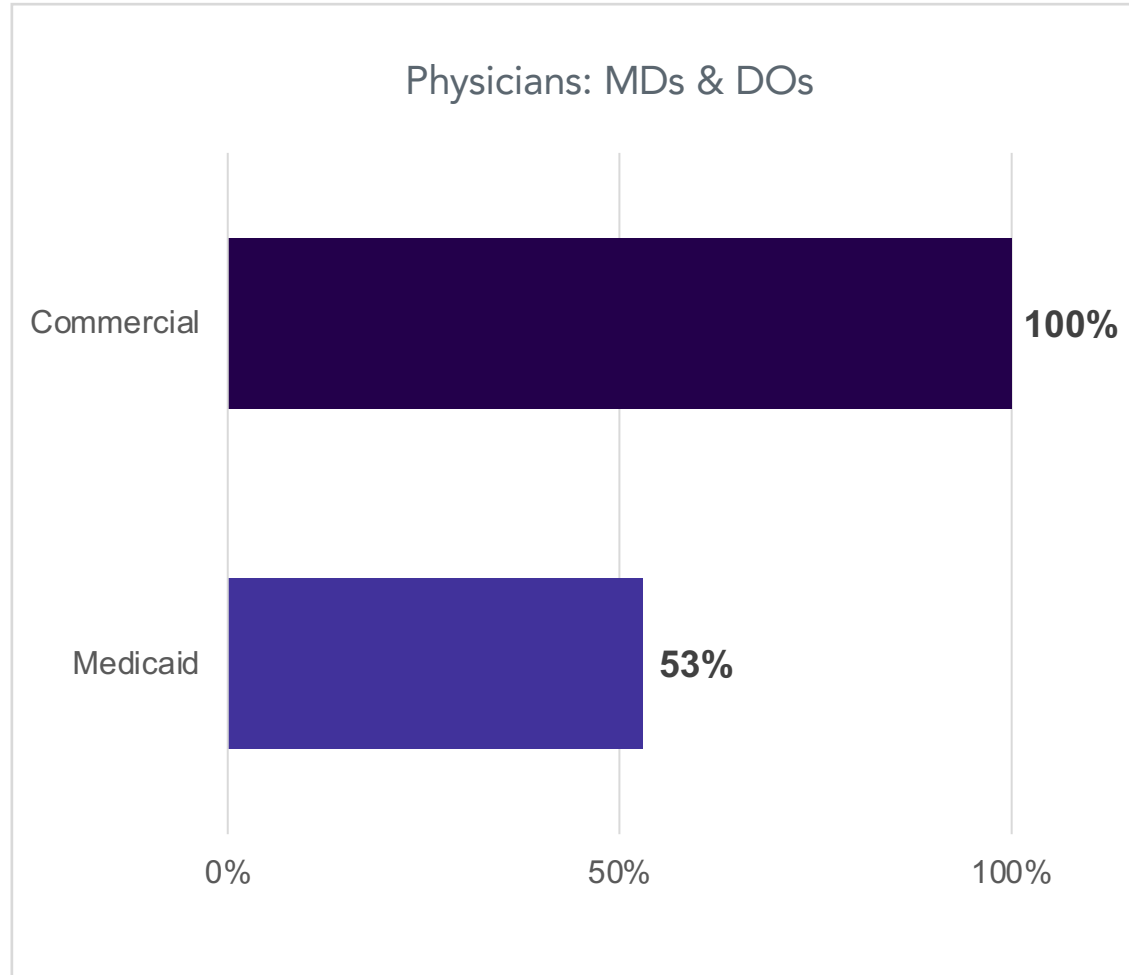
All Medicaid Providers



Ten states do not have
Managed Medicaid programs

**Alabama, Arkansas, Connecticut,
Idaho, Maine, Montana,
Oklahoma, South Dakota,
Vermont, and Wyoming**

Physician Count Comparison: Commercial and Managed Medicaid

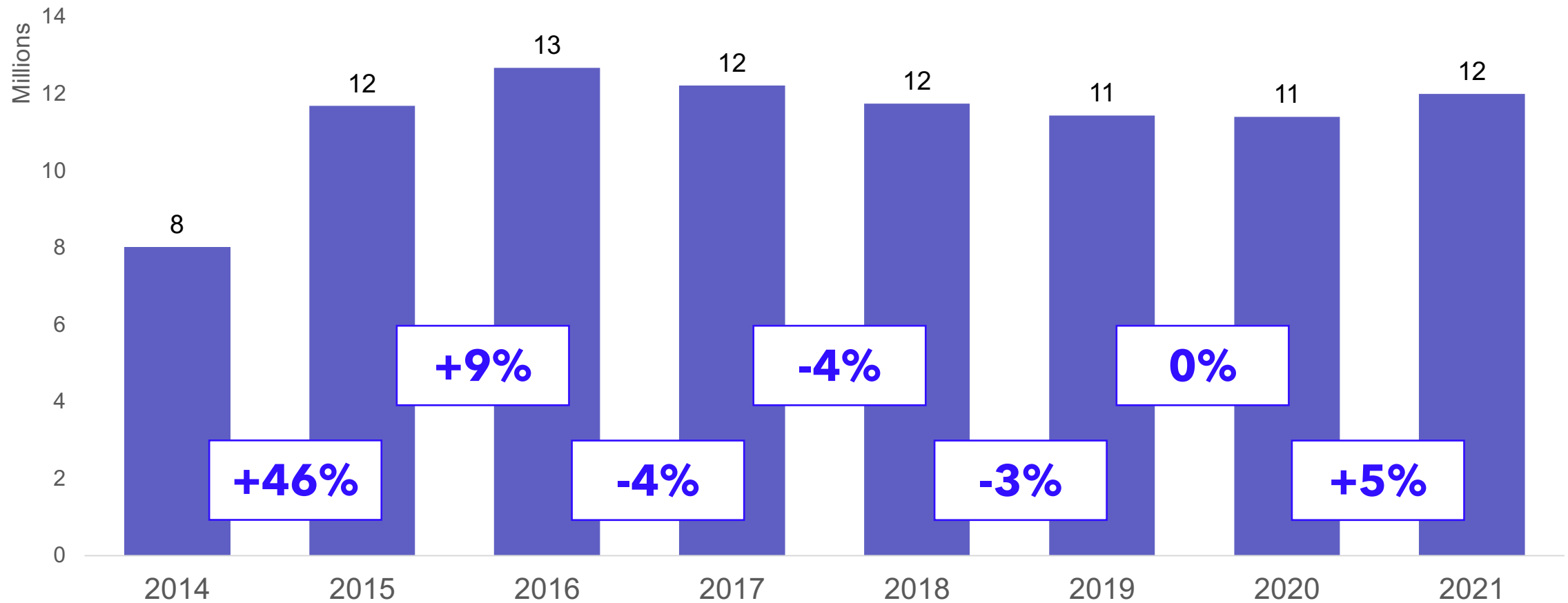


Ten states do not have Managed Medicaid programs:
Alabama, Arkansas, Connecticut, Idaho, Maine, Montana, Oklahoma, South Dakota, Vermont, and Wyoming.

Exchange

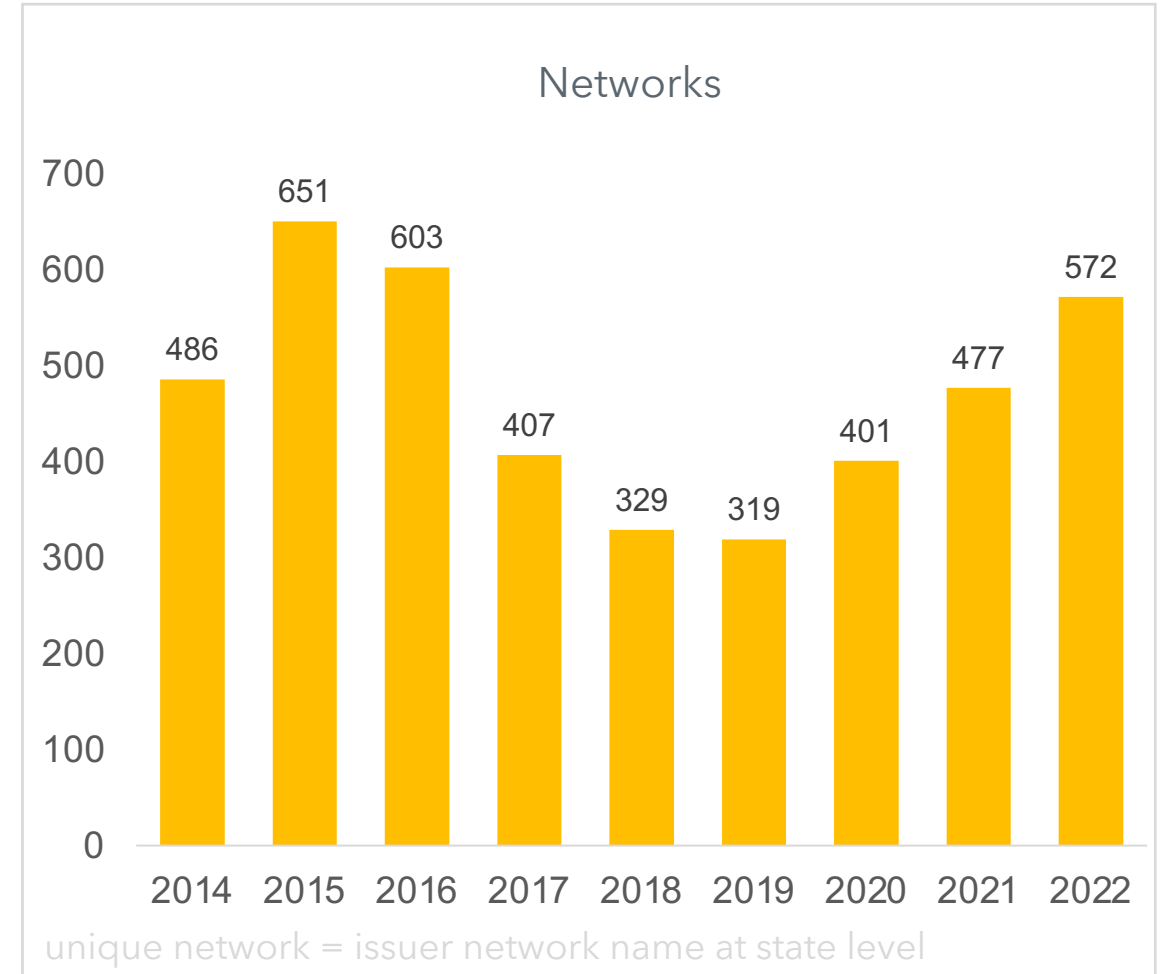
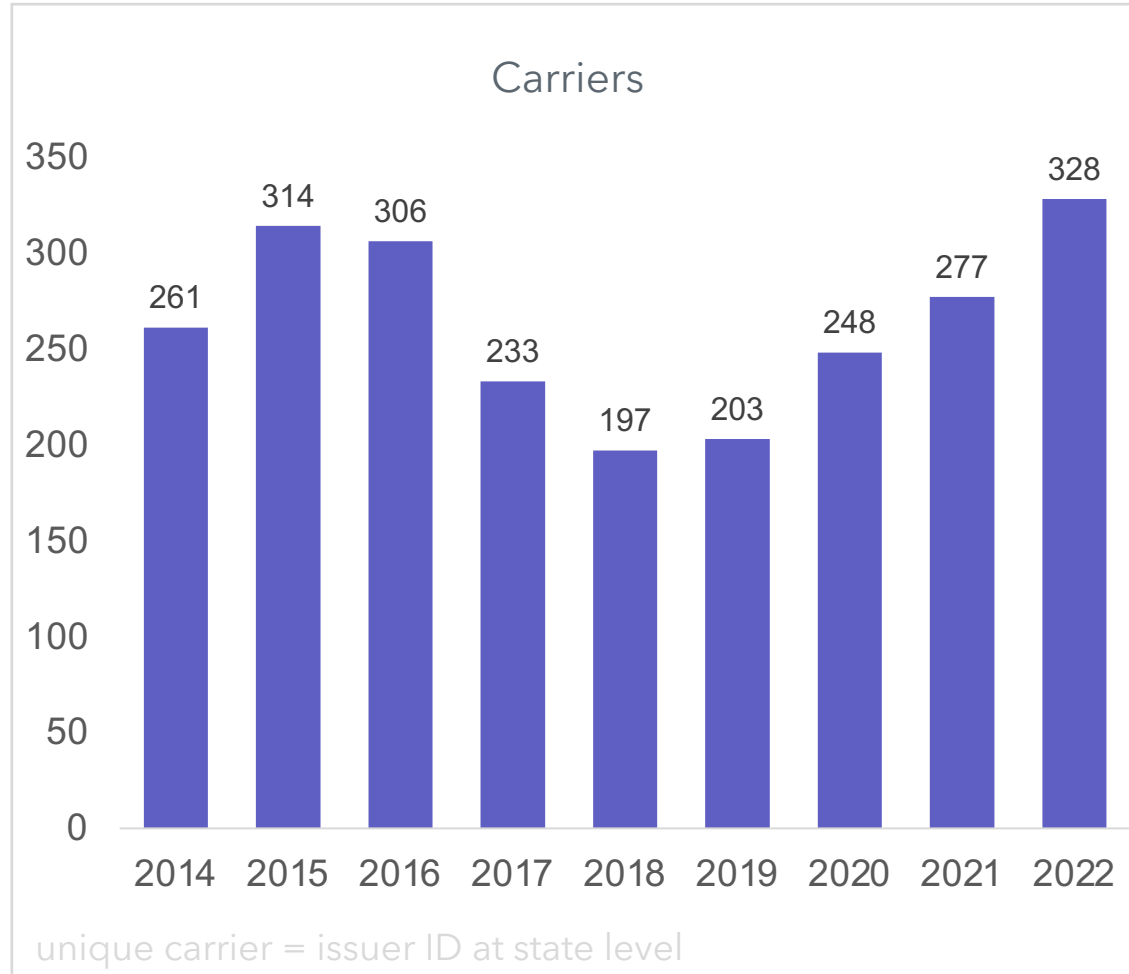


Public Exchange (HIX) Enrollment

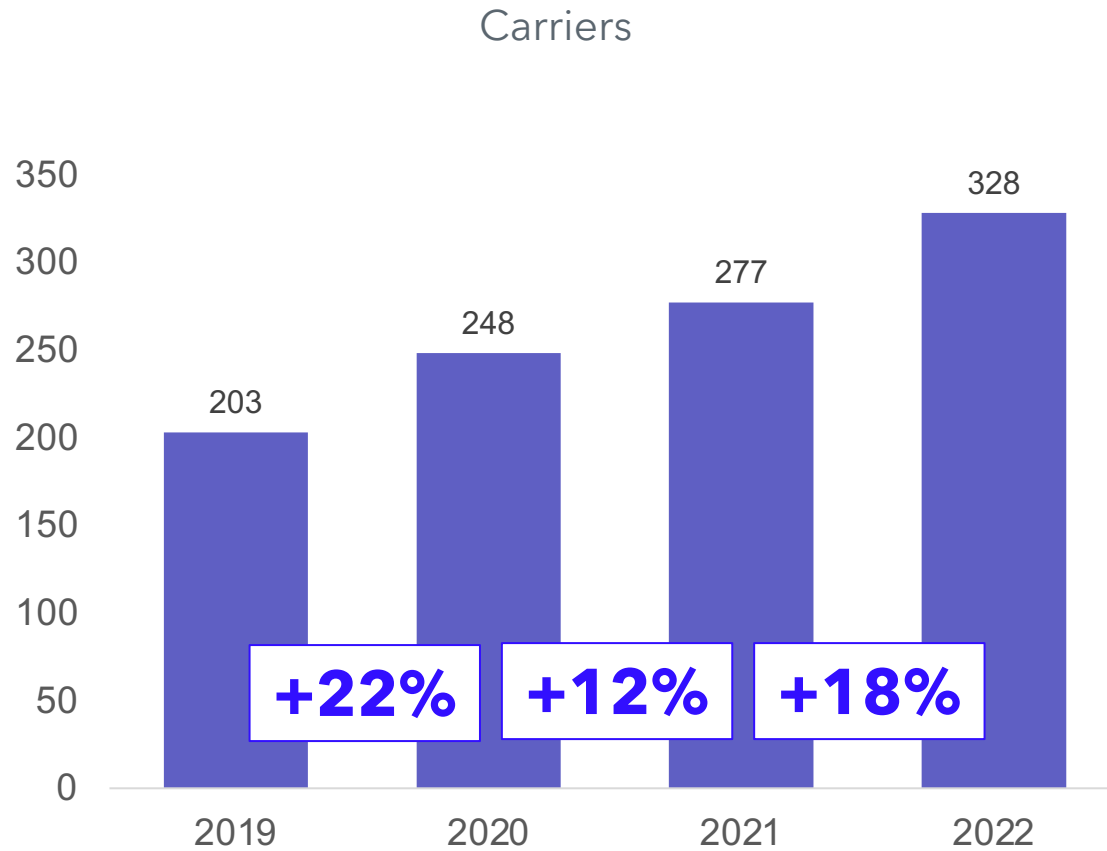


source: <https://www.kff.org/state-category/affordable-care-act/health-insurance-marketplaces/>

Public Exchange (HIX) Participation



Public Exchange (HIX) Participation



unique carrier = issuer ID at state level

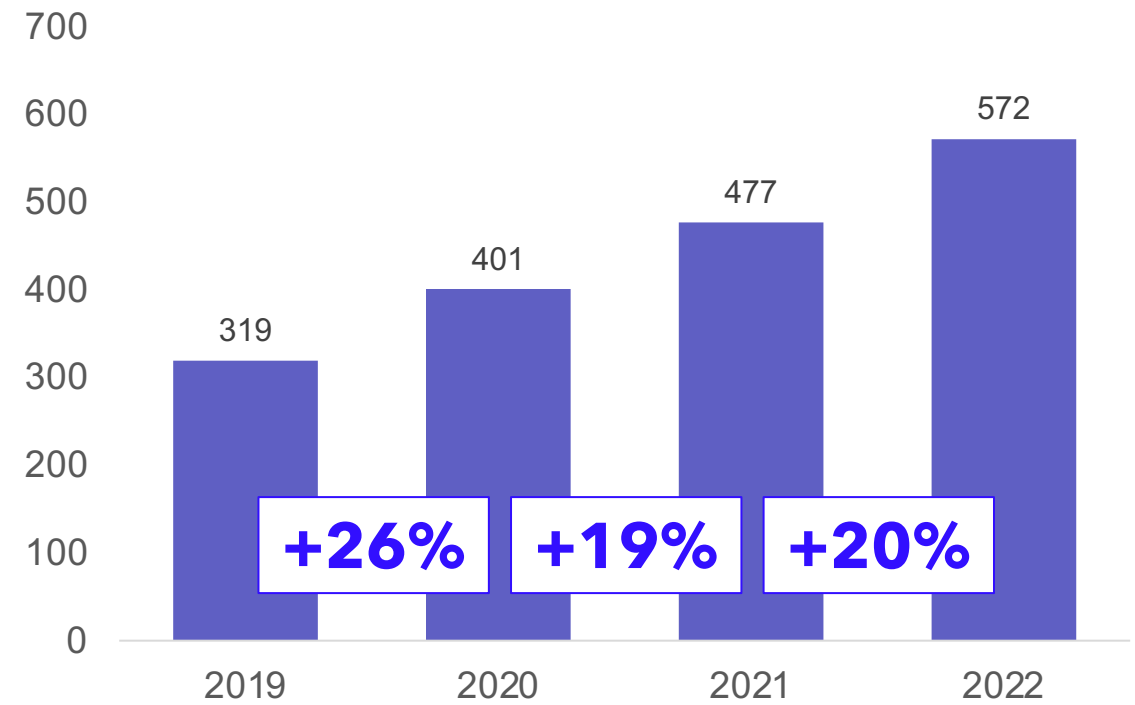
52
new Exchange carriers

Public Exchange (HIX) Participation

125

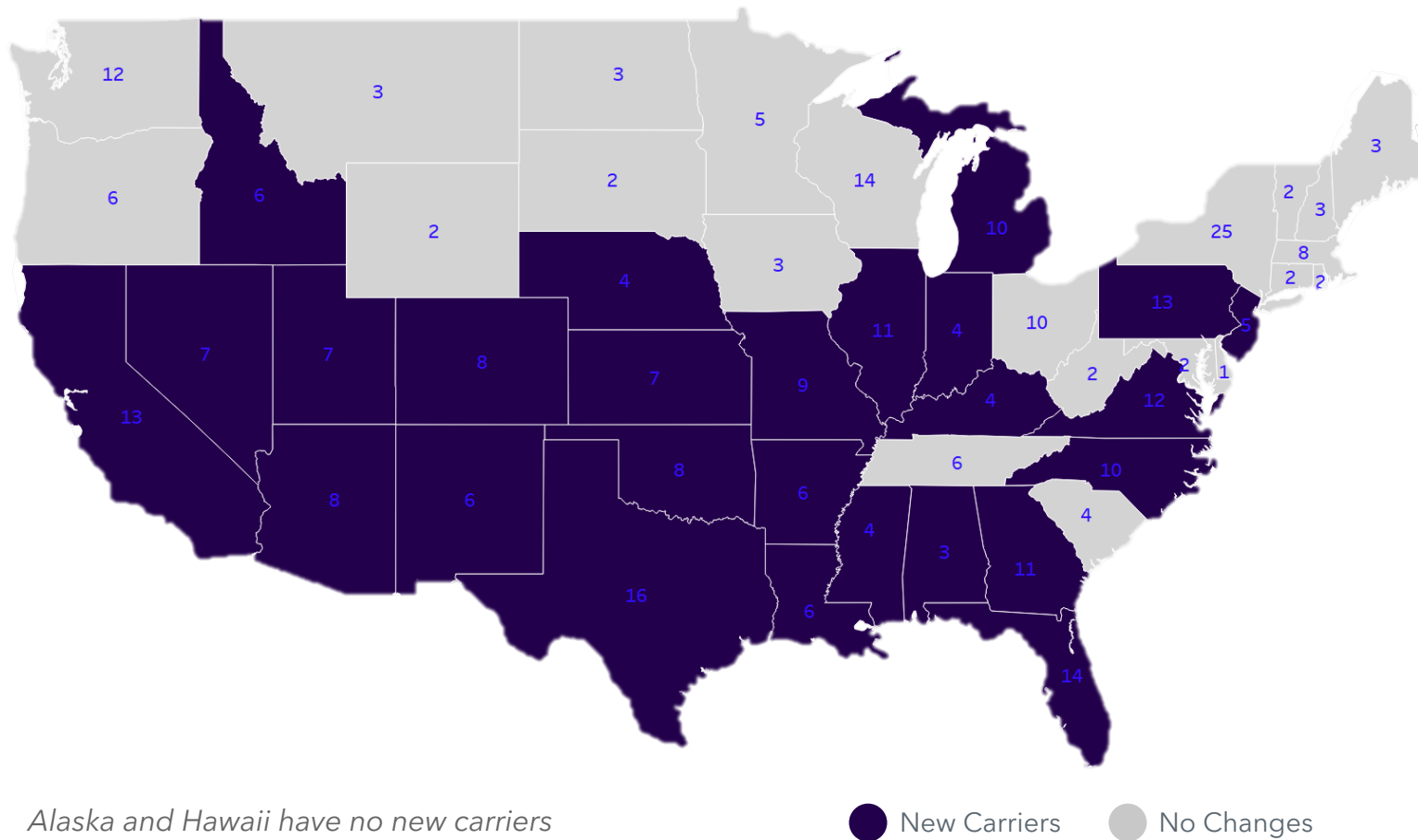
new Exchange
networks offered
by carriers

Networks

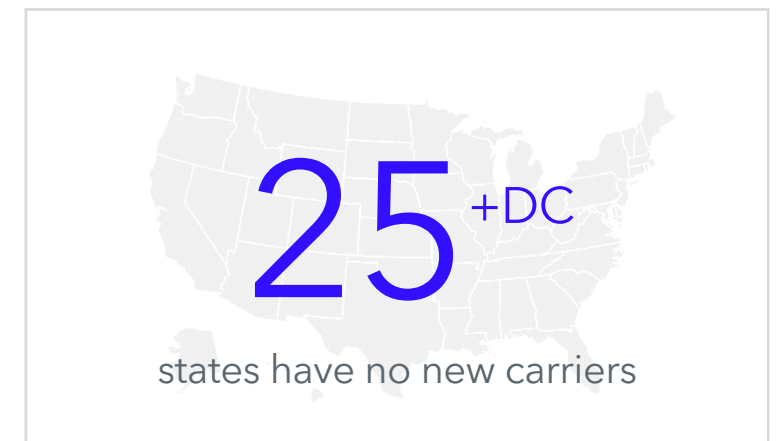
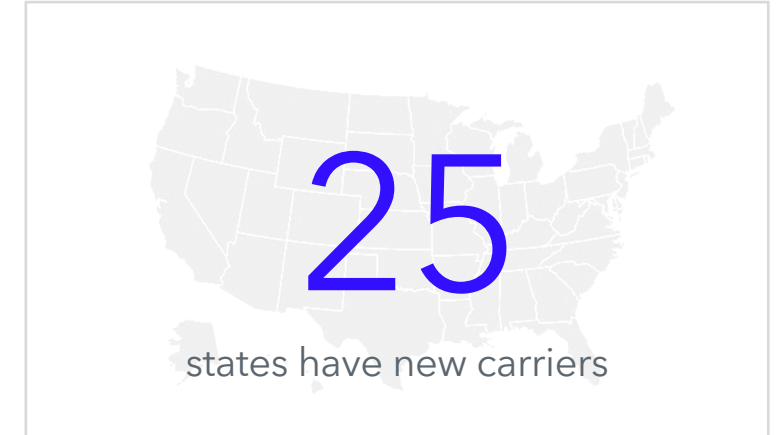


unique network = issuer network name at state level

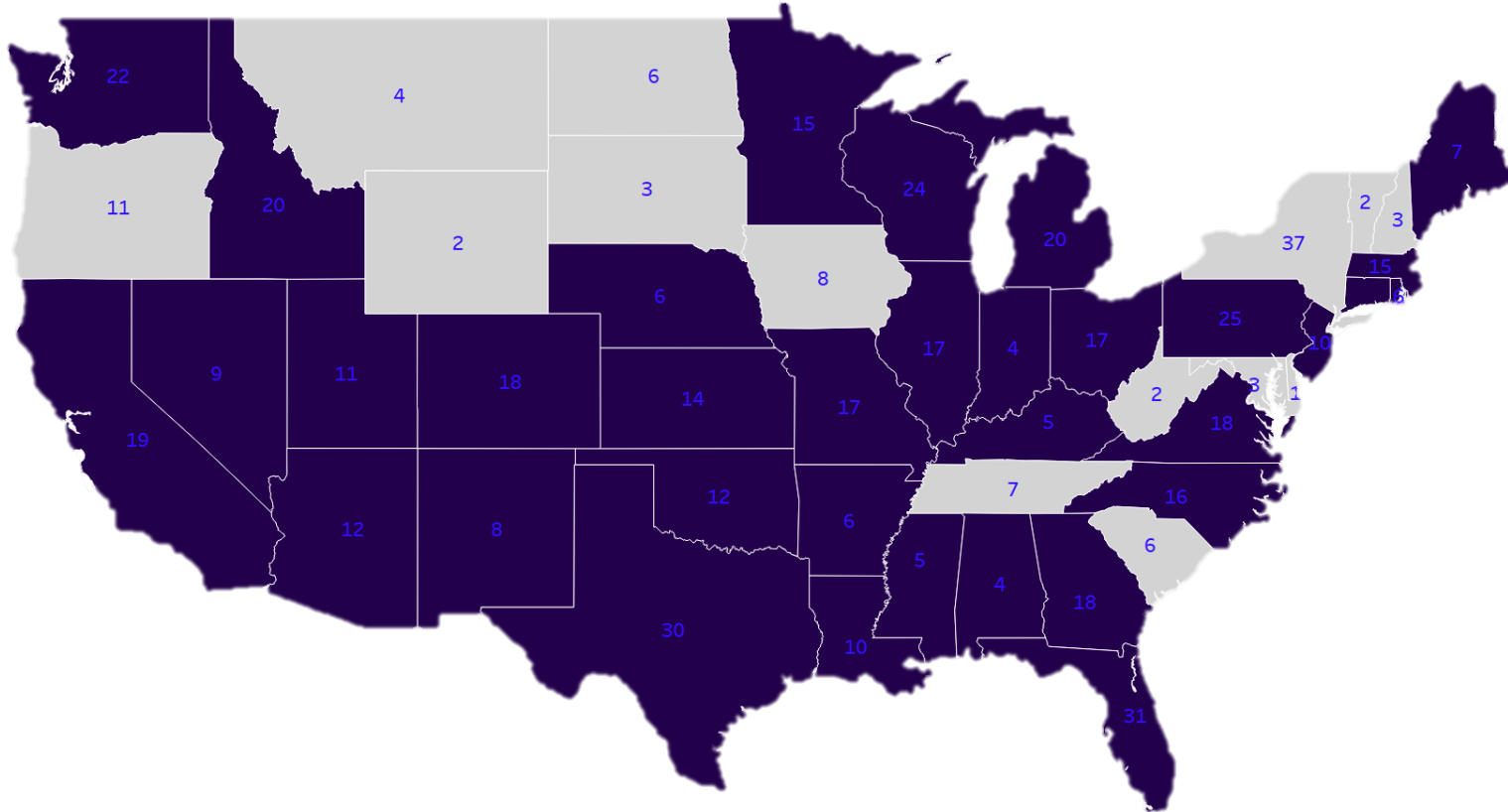
2022 Carrier Counts by State



2021 TO 2022 CHANGES



2022 Network Counts by State



Alaska and Hawaii have no new networks

● New Carriers ● No Changes

2021 TO 2022 CHANGES

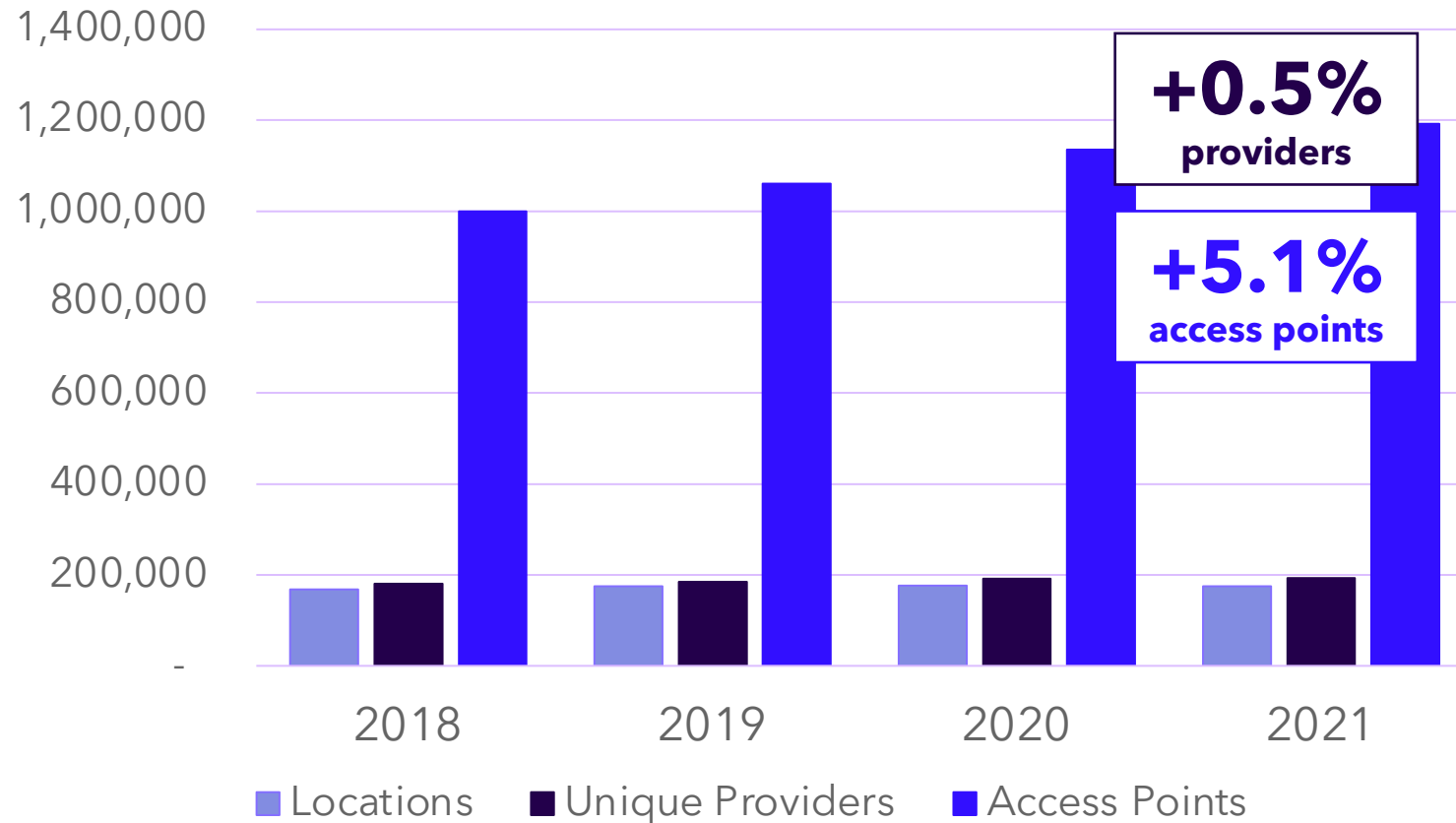


Dental



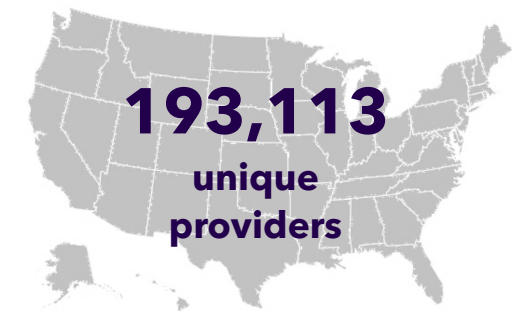
State of the Dental Provider Universe

Dental Provider Counts: General Dentists and Specialists



Our dental market includes MDs and DOs, contracted with at least one dental plan in the US.

All Dental Providers



General



158,377
general dentists

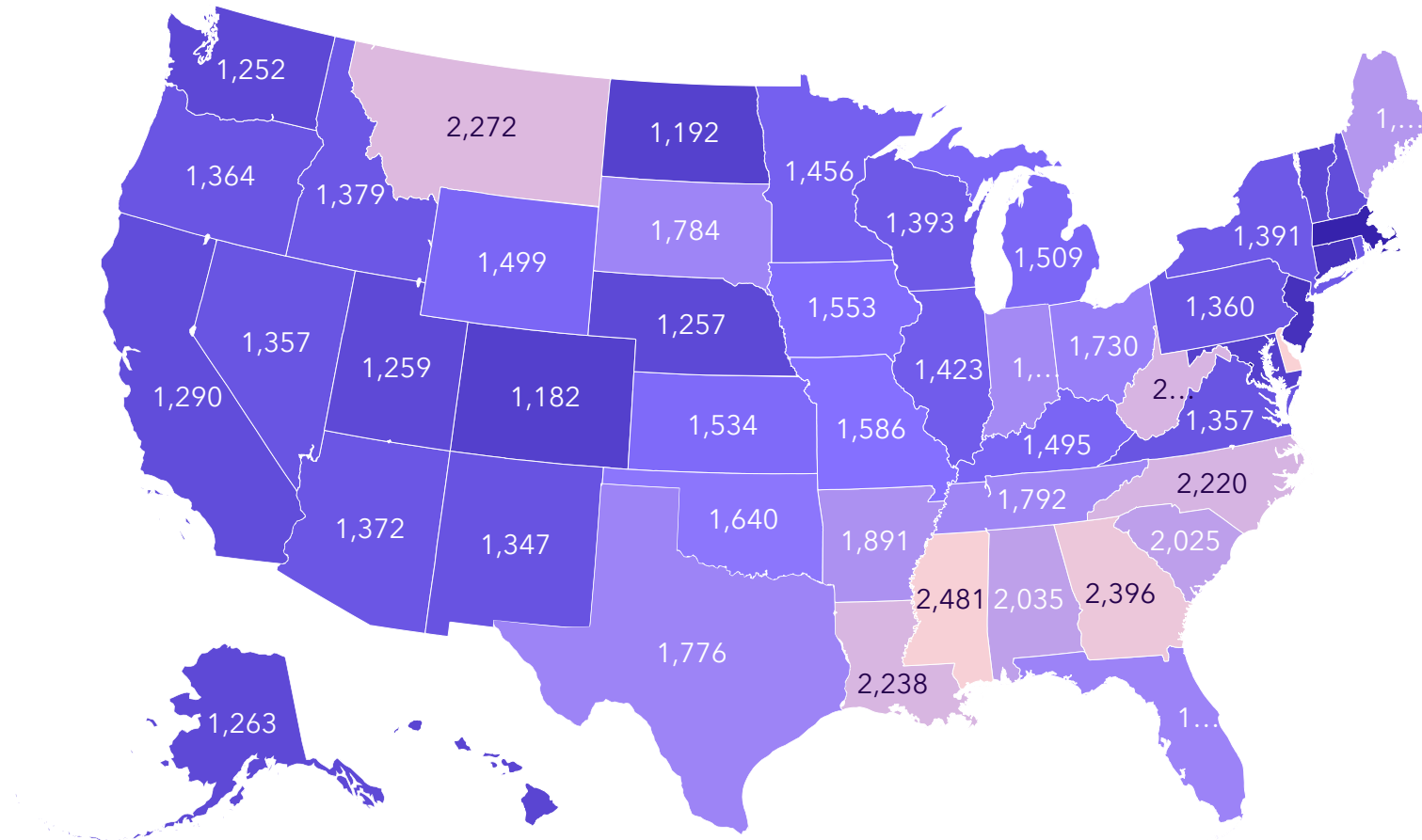
Specialists



40,328
specialists

Dental Provider Supply

The number of people to each individual provider: 1 provider to X people in state



US Census: State Population Totals and Components of Change: 2020-2021

All Dental Providers



General



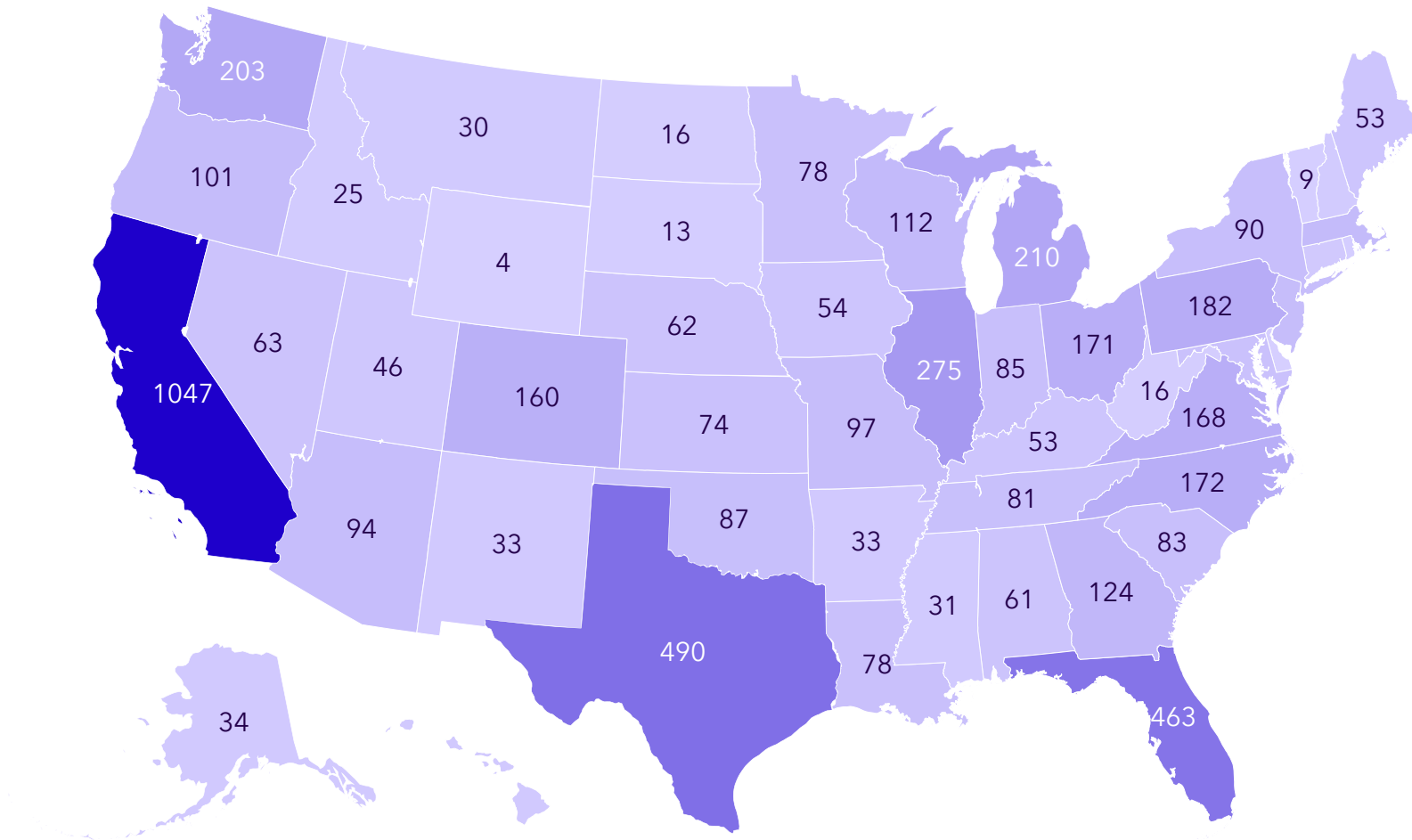
1:2,116
general dentists

Specialists



1:8,311
specialists

New Dental Providers



All Medical Providers



Rural Counties

+226
dental
providers

CEAC Counties

+66
dental
providers

Let Zelis provide you confidence in your network and peace of mind for your provider data.





Network360 Insights

Go deeper with your provider network analysis.

Tell your network story

Whether you are developing, managing, or selling networks; Zelis can help you tell your network story with Network360 Insights.



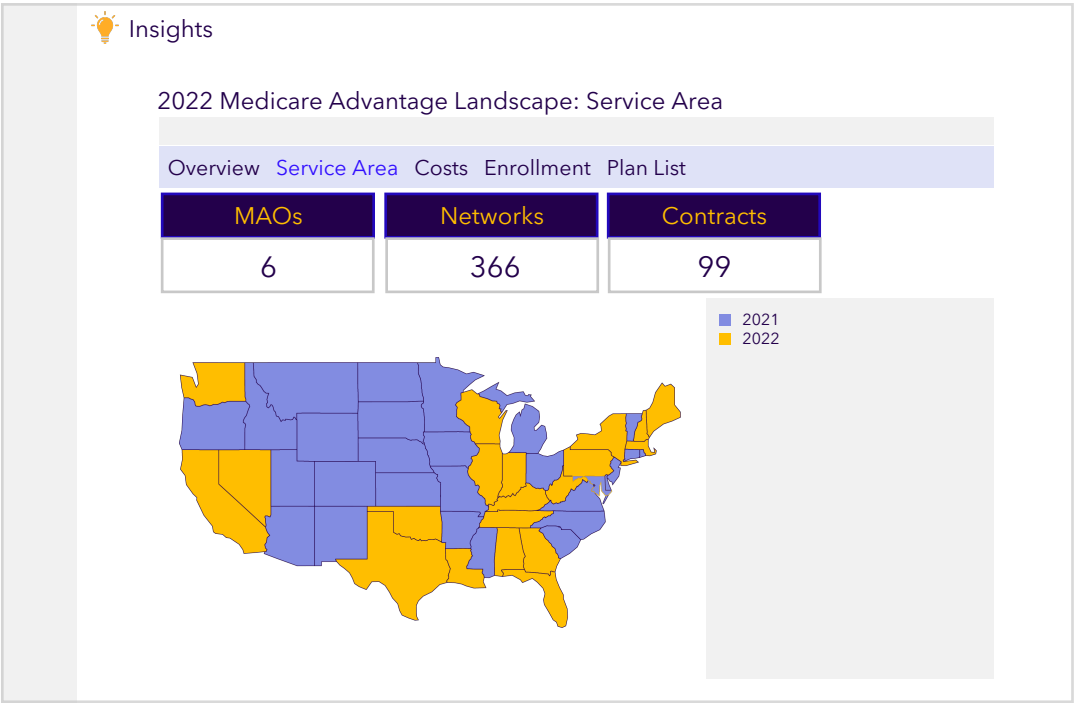
Data

Clean, standardized, and consolidated provider **data** sourced from over 1,000 networks



Visual Design

Interactive **visualizations**, that help bring meaning to your data.



Tools

An analytics suite of **tools** designed to help you build and deliver quality, competitive, provider networks



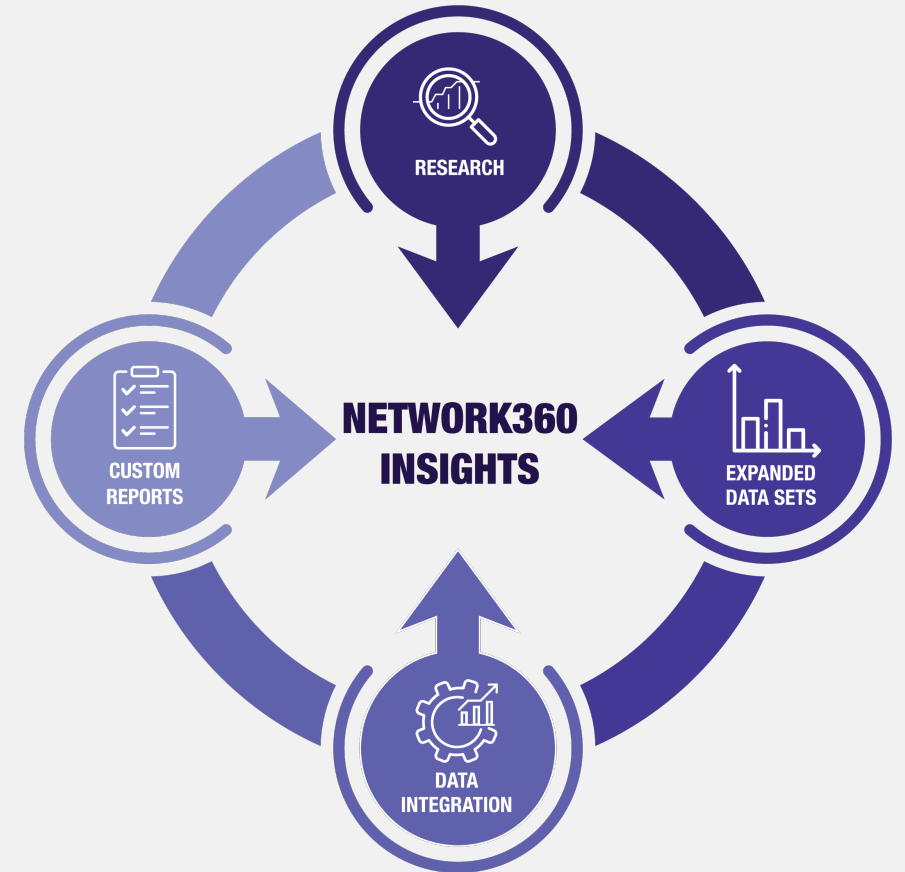
Narrative

A clear **narrative** based on how you fit into the changing market

We remove the noise, so you get insights faster

Your Insights analyst can serve as an extension of your team:

1. Carry out **research** to clearly define the problem
2. Identify **expanded datasets** to refine your results
3. **Integrate additional data** into your analysis
4. Design and build **custom, dynamic dashboards**



Market Landscape Dashboards: Medicare Advantage

CMS plan code to Medicare Advantage Organization network mappings enable additional data points to be integrated into the analysis, like:

- plan type
- service area
- cost
- enrollment
- year-over-year comparisons



Insights

2022 Medicare Advantage Landscape: Overview

[Overview](#) [Service Area](#) [Costs](#) [Enrollment](#) [Plan List](#)

MAOs

704

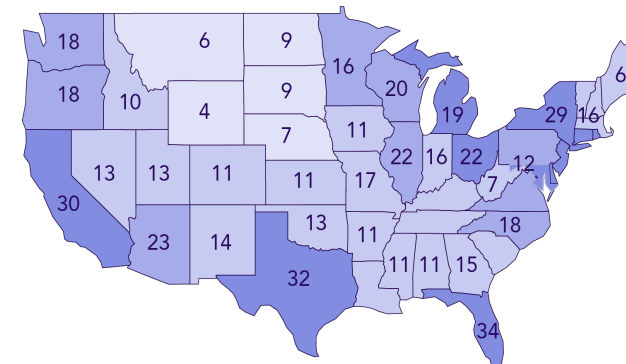
Networks

3,488

Contracts

733

OVERVIEW



ORGANIZATION NAME

Absolute Total Care
Advantage U Medicare
Aetna Better Health of Ohio
Aetna Better Health of Virginia
Aetna Better Health Premier Plan
Aetna Medicare
AgeRight Advantage
AgeWell New York
AHF

Market Landscape Dashboards: Exchange

CMS plan code to Exchange network mappings enable additional data points to be integrated into the analysis, like:

- plan type
- service area
- cost
- enrollment
- year-over-year comparisons



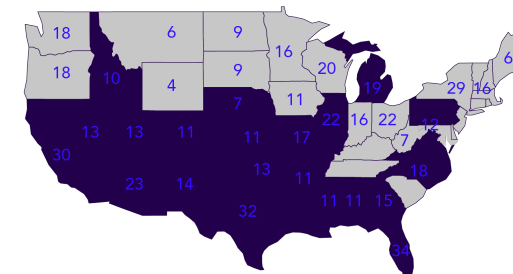
Insights

2022 Public Exchange Landscape: Overview

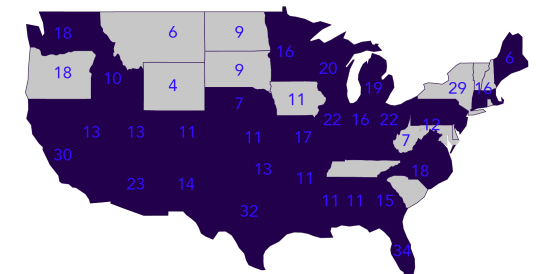
[Overview](#) [Service Area](#) [Costs](#) [Enrollment](#) [Plan List](#)

ISSUERS	NEW ISSUERS	NETWORKS	NEW NETWORKS
341	52	585	125

STATES WITH NEW ISSUERS IN 2022



STATES WITH NEW NETWORKS IN 2022



Want to learn about going deeper with
your provider network analytics?

Contact us at:

insights@zelis.com

zelis[®]

Sources

Zelis 2021 | Zelis Network Analytics

Our data is directly sourced from carriers' online directories and represents a snapshot of key market players in the US. We include providers with at least one managed care contract nationwide, and the underlying data is updated on a quarterly basis. This analysis looks at data from Q2 of 2021.

Provider Counts

	Medical	Medicare	Medicaid	Dental
Carriers	280	141	136	29
Networks	1,027	428	243	52

Carrier, Network, and Enrollment Data

	Carriers and Networks	Enrollment
Medicare	Carriers: CMS - 2022 MA Landscape Source Files Networks: Research was conducted by our research analyst to identify the networks being offered.	KFF - Total Number of Medicare Beneficiaries
Medicaid	KFF - Medicaid MCO Enrollment by Plan and Parent Firm	KFF - Medicaid MCO Enrollment by Plan and Parent Firm
Exchange (HIX/ACA)	FFM states: Health Insurance Exchange Public Use Files (Exchange PUFs) SBE states: Research was conducted by our research analyst to identify the carriers and their networks being offered.	KFF - Marketplace Enrollment, 2014-2021

Population Data

United States Census Bureau: State Population Totals and Components of Change: 2020-2021: <https://www.census.gov/data/tables/time-series/demo/popest/2020s-state-total.html>
(NST-EST2021-POP)

KFF: Population Distribution by Age (CPS): <https://www.kff.org/other/state-indicator/population-distribution-by-age-cps/>