

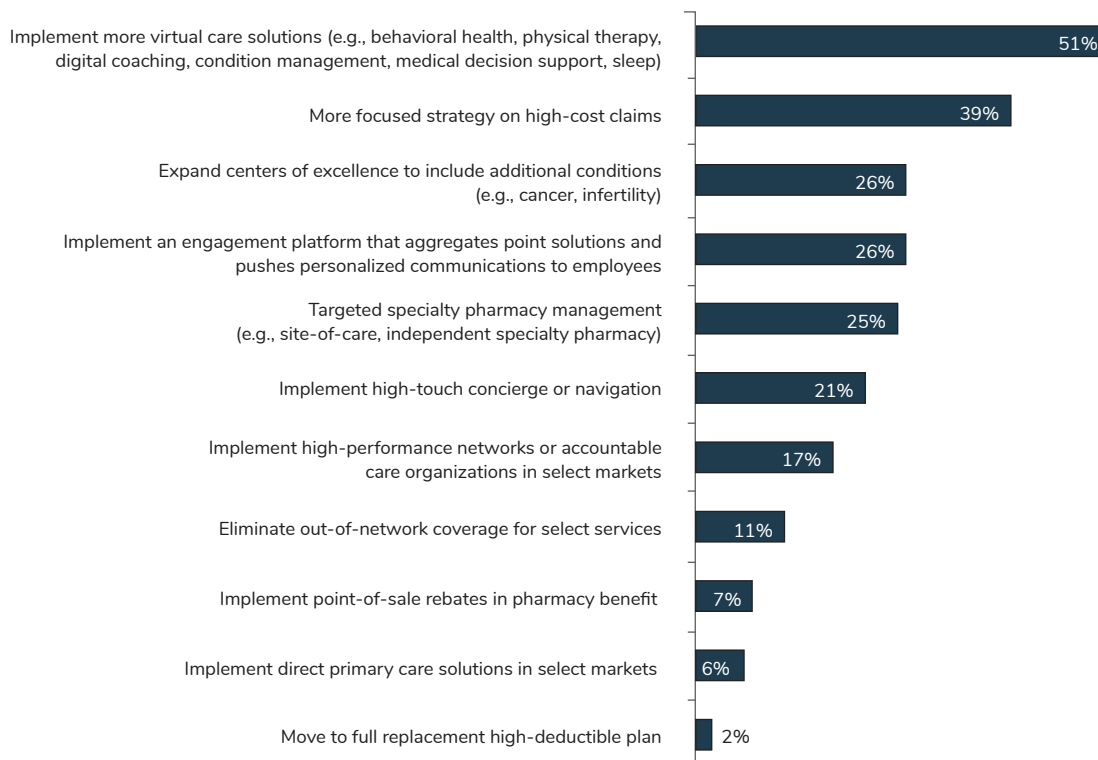
## SECTION II:

# EXECUTIVE SUMMARY

### Large Employer Changes for 2020

Employers' survey responses clearly revealed the issues that are uppermost on their minds. Of the initiatives employers were asked about, implementing virtual solutions (51%) and developing a more focused strategy to address high-cost claims (39%) were at the top of the list, followed by expanding centers of excellence to include other conditions (26%) and implementing engagement platforms that aggregate top solutions (26%). The complete list is shown below (Figure 2.1).

Figure 2.1: Large Employers' Top Health Care Initiatives, 2020

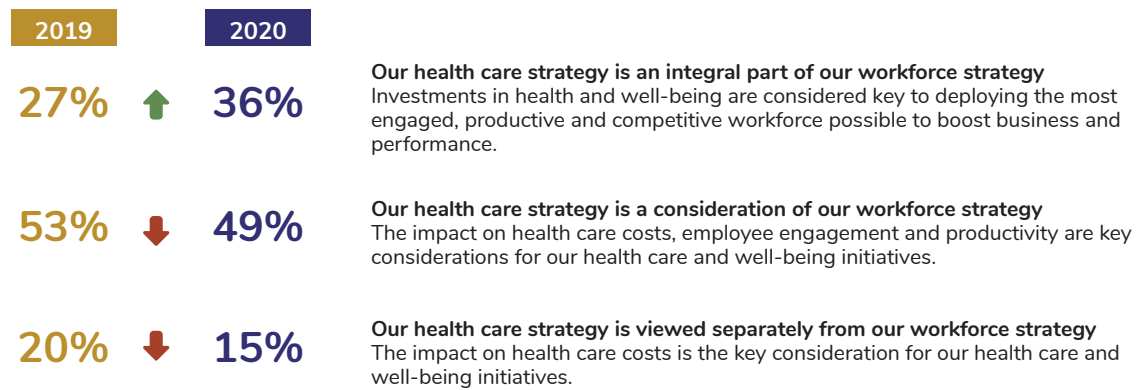


The following key findings emerged from the survey results. Each will be discussed in more detail in the appropriate sections of the report.

1.

**Compared to last year's findings, more employers see their health care strategy as an integral part of their workforce strategy.**

**Figure 2.2: The Growing Importance of Large Employers' Health Care Strategy in Their Workforce Strategy, 2019-2020**

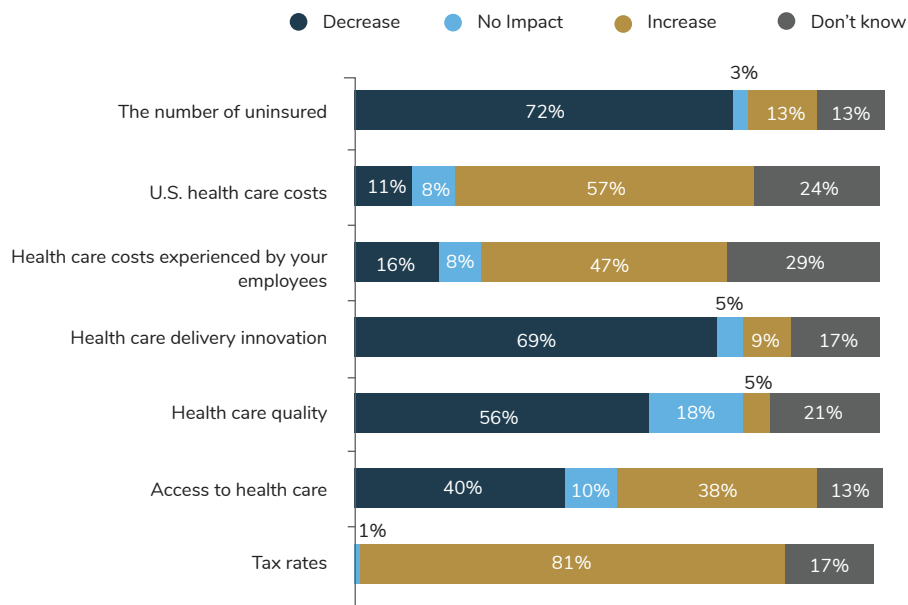


More companies view investment in health and well-being as an integral element of their workforce strategy.

## 2.

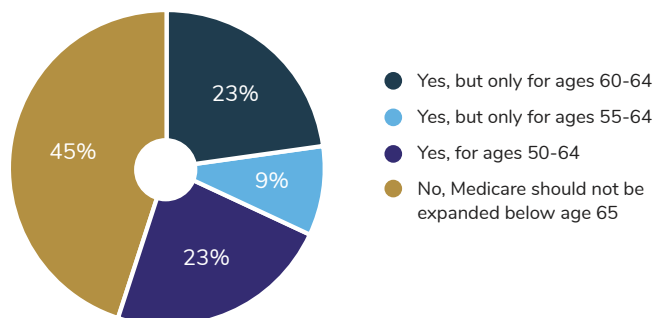
Most employers have significant reservations about Medicare for All. They think that the public option will raise costs and reduce quality, though the number of uninsured people may decline. On the other hand, employers are split on whether Medicare should be expanded to people below age 65.

Figure 2.3: Large Employers' Views on the Impact of Medicare for All, 2019



Note: Percentages may not total 100% due to rounding.

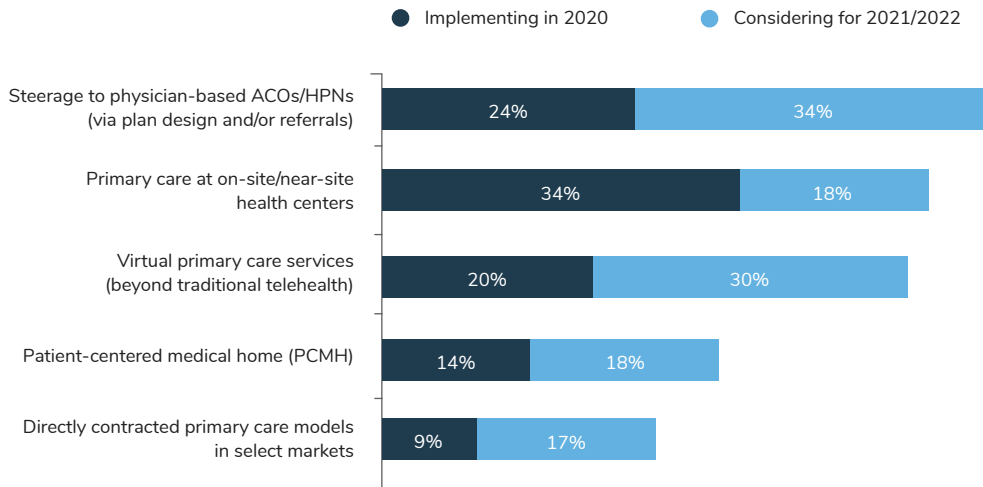
Figure 2.4: Large Employers' Views of Medicare Expansion by Age, 2019



### 3.

## Implementing advanced primary care strategies is an emerging trend among employers.

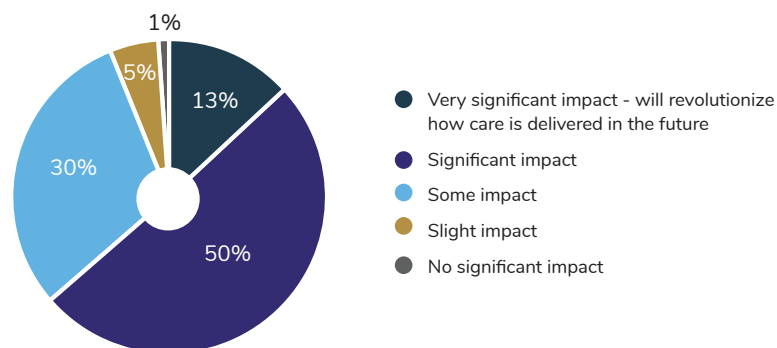
Figure 2.5: Large Employers' Implementation of Advanced Primary Care Strategies, 2020-2022



### 4.

## Employers see virtual solutions as having a growing impact in the future.

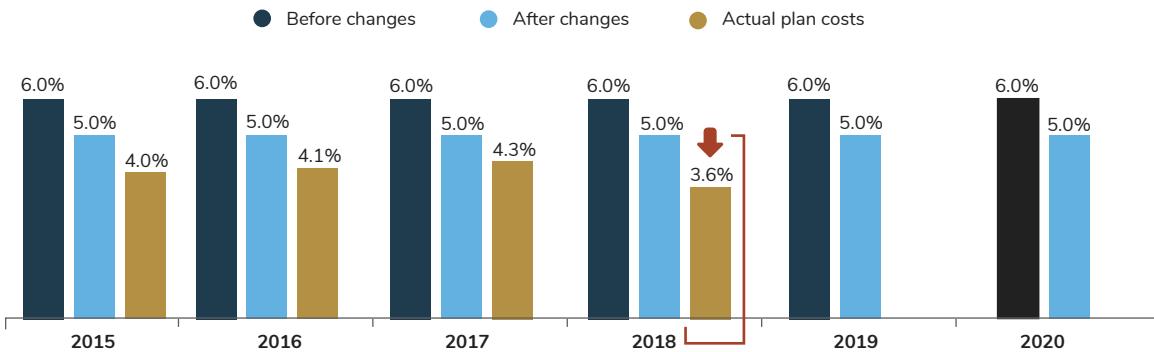
Figure 2.6: Large Employers' Views on the Impact of Virtual Care, 2020



# 5.

The median health care cost trend increase was 3.6% in 2018, primarily driven by unit cost price increases, not utilization.

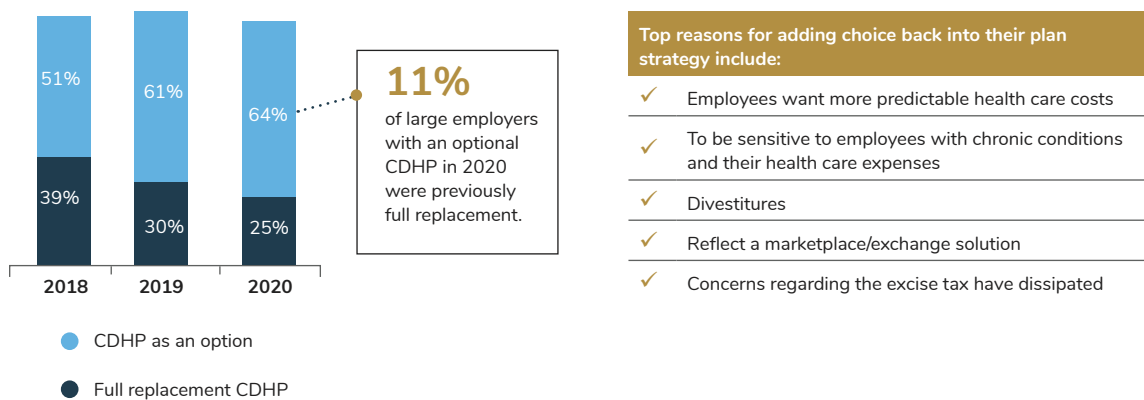
Figure 2.7: Large Employers' Median Health Care Cost Trend Increases, Actual and Projected, 2015-2020



# 6.

Employers are adding choice back into their plan offerings.

Figure 2.8: Large Employers Adding Choice Back into Their Plan Offerings, 2019



# 7.

## Employers would consider a role for the government in the financing of high-cost drug therapies.

Figure 2.9: Large Employers' Views of Government Intervention with High-Cost Drug Therapies, 2019

