

# The Enduring State of Medicaid

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# For the first time in five-plus years, Medicaid enrollment declined in 2018

**74.2 million**  
**22.8% of US**

**From 2017:**

**↓ 1.1 million**  
**↓ 1.5%**

**From 2013\*:**

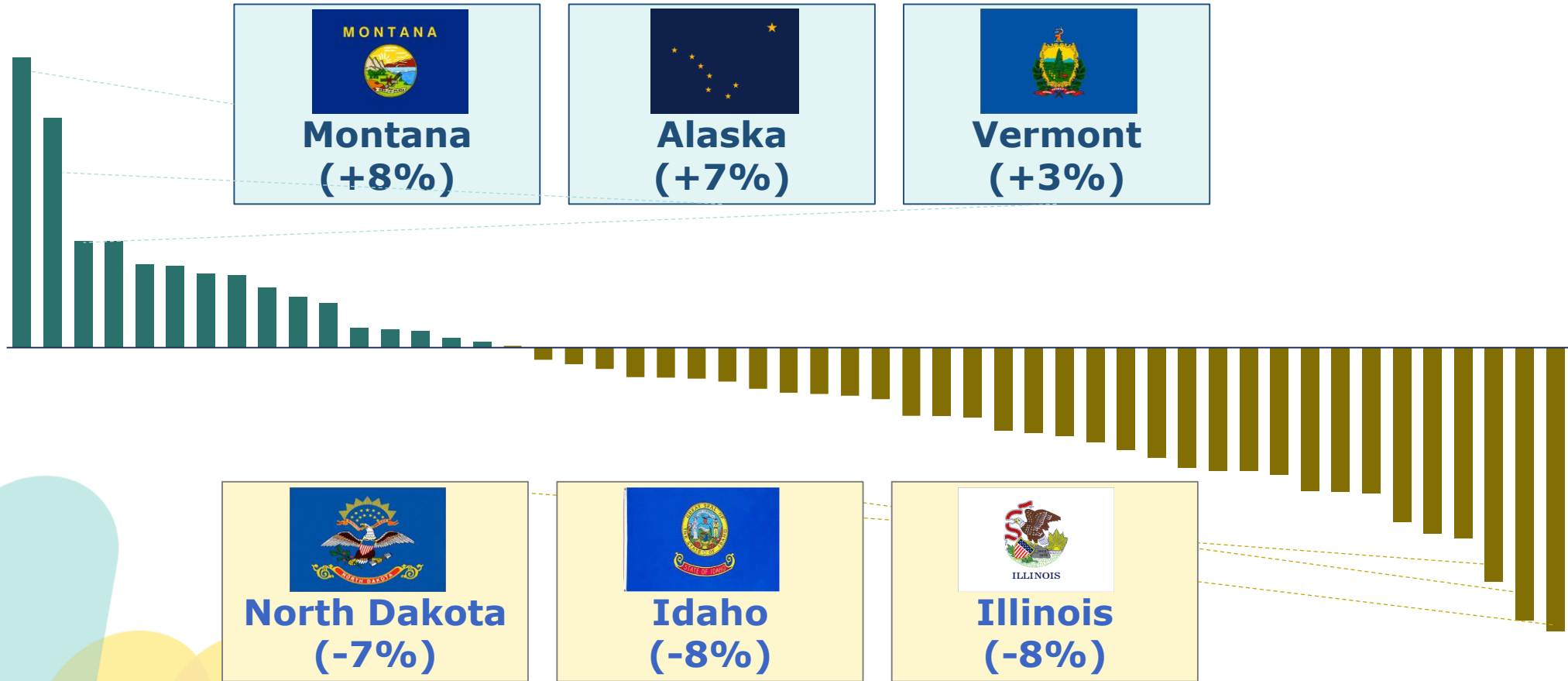
**↑ 17.1 million**  
**↑ 30.0%**

**Improving  
economy &  
employment**

**No new  
expansion  
implementations**

**Heightened  
eligibility  
management**

# Two-thirds of states posted enrollment declines in 2018



# Across America, Medicaid is the dominant healthcare financing program



**Washington DC**  
**39.3% of state**



**New Mexico**  
**34.9% of state**



**California**  
**33.3% of state**

**Highest Medicaid  
Share Counties**



**Kusilvak, AK**  
**81.3% of county**

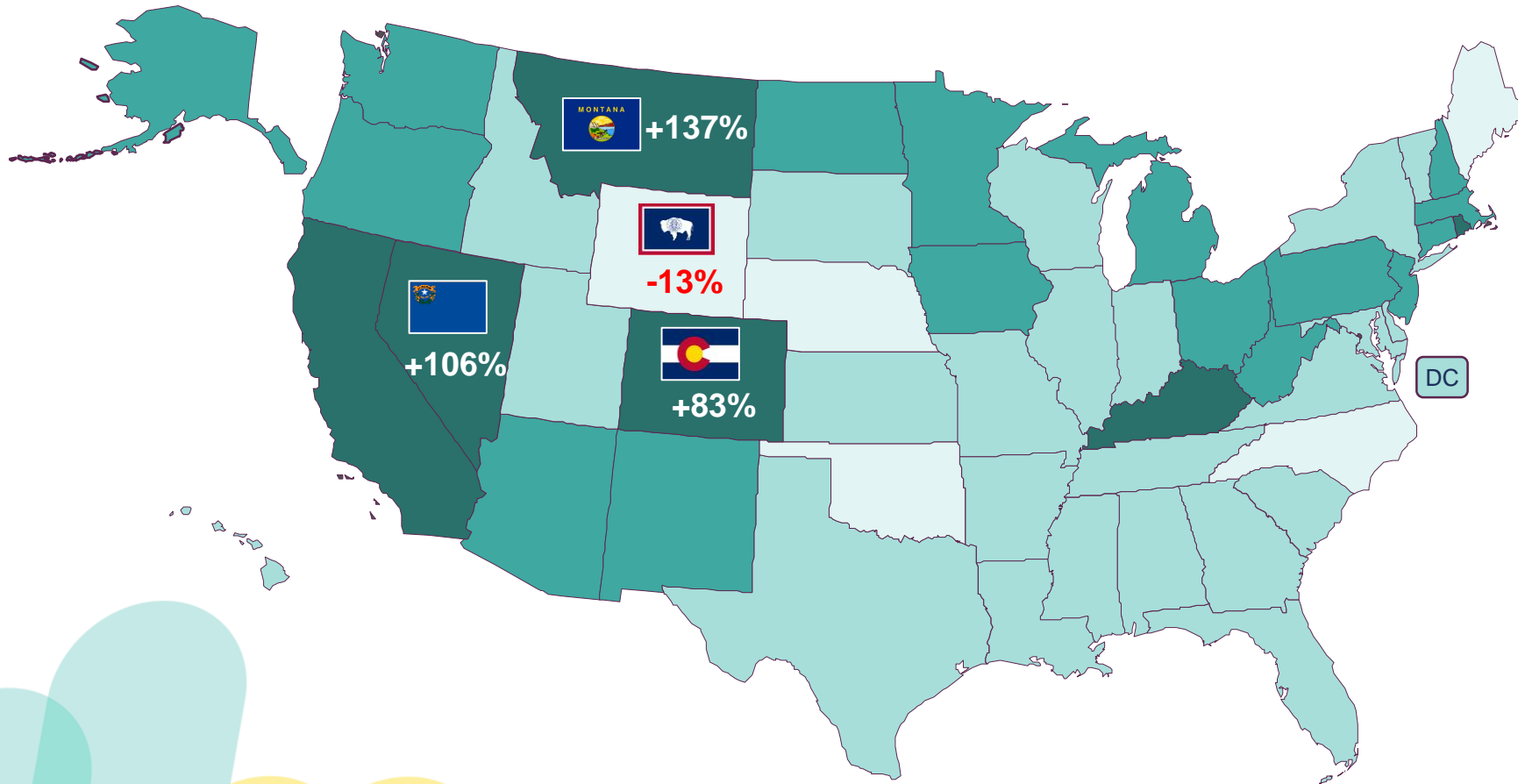


**Owsley, KY**  
**65.5% of county**



**Sierra, NM**  
**59.0% of county**

# Enrollment gains in Medicaid since 2013 have been most significant in the West



Only 5 states down

13.1% of Montanans added

38% average growth for Expansion states

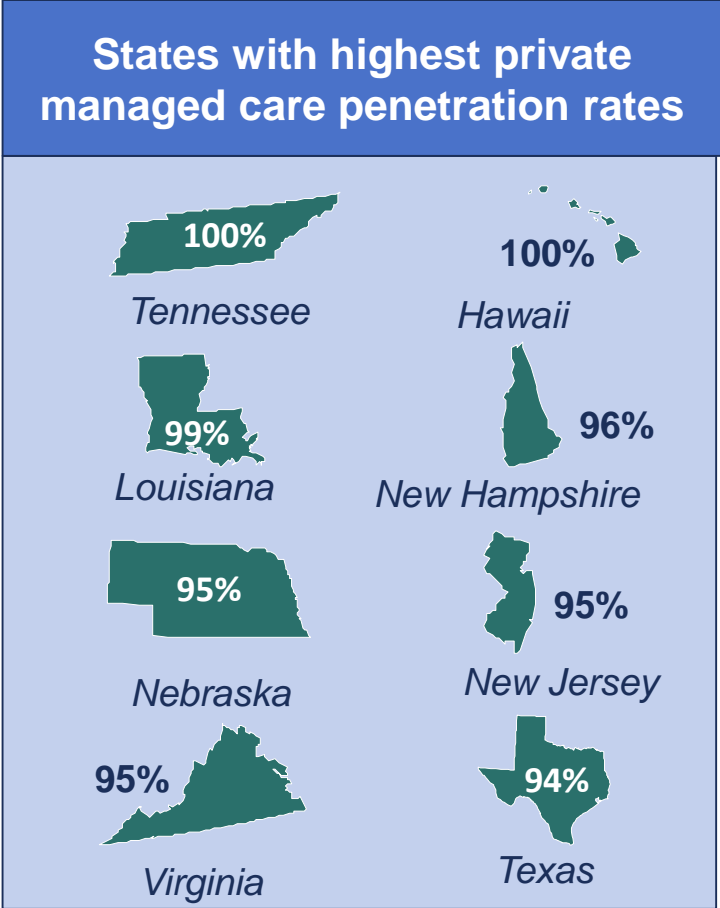
Down >0%   Up 0% - 30%   Up 30% - 60%   Up >60%

# Enrollment in private Medicaid health plans continues to grow

**54.9 million**  
**74.0% of total**

**From 2017:**  
↓ 120,000  
↓ 0.2%

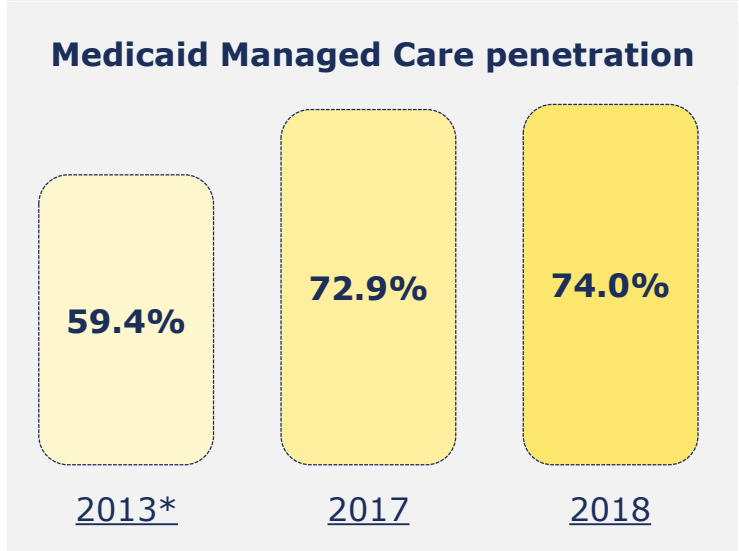
**From 2013\*:**  
↑ 21.0 million  
↑ 61.8%



\* Source: PwC, *The State of Medicaid in the United States*

# Enrollment in private Medicaid health plans continues to grow

Managed care penetration continues to increase ...



...while current RFP activity is relatively minimal in the near future...

- NH** Active Managed Care procurement
- NC** Active Managed Care procurement; currently FFS-only
- HI** RFI issued; expect procurement in 2019

... with the largest 10 managed care plans covering ~60% of lives



\* Source: PwC, *The State of Medicaid in the United States*

# Managed care continues to consolidate as sub-scale plans exit the market

**152 plans**

 **14 from 2017**

**10 plans over  
1MM lives**

 **1 from 2017**

**58 plans under  
50,000**

**174,000 average  
size\***

 **15,000 from 2017**

**43 plans Medicaid  
only**

**80% non-profit**

**76 plans provider-  
affiliated**

**Largest Managed  
Care Counties**



**Los Angeles, CA**  
**3,900,000**  
**members**



**Cook, IL**  
**1,120,000**  
**members**



**Maricopa, AZ**  
**940,000**  
**members**



# Market participants will need to consider a number of trends in the coming years

**1** Medicaid enrollment reaches natural ceiling

- Less greenfield growth
- Consolidation continues

**2** Long-term pressure on rates

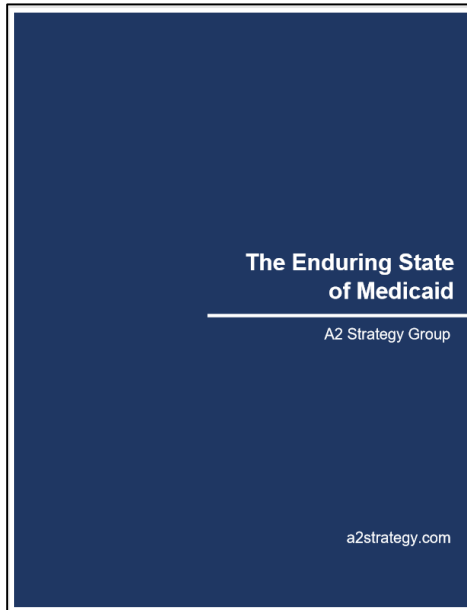
- Cost containment critical
- Focus on pharma spend

**3** Managed care covers more complex populations

- Build-or-vend?
- Duals 2.0

# For the report & data set

## 2018 Full Report



## New – detailed county-level enrollment data

County	Plan A	Plan B	Plan C	Plan D	Plan E	Plan F	Plan G	Plan H	Plan I	Plan J	Plan K	Plan D	Total Medicare Eligibles
Alachua	1	1	150	1	7,310	12,639	125	6	8	5,453	8,189	1,352	3,874
Baker	-	-	2	0	1,521	45	169	1748	840	770	2301	1,443	692
Bay	-	-	51	0	258	15,291	316	1,068	9	470	12,747	922	2,233
Bradford	-	-	12	0	1,710	1,140	15	2	10	1,229	808	81	707
Brevard	314	-	12,090	4	8,245	7,878	472	3,072	5,322	15,063	20,141	2,640	9,032
Broward	97	775	74,304	40,743	72,910	122	88,648	7,577	161	144	130	771	3,934
Calhoun	-	-	4	0	13	1,335	82	166	1	138	1,166	922	2,233
Charlotte	-	-	49	0	4,488	4,488	134	-	1,615	150	7,033	81	707
Citrus	4	-	36	2	4,875	2,813	73	4	10	4,886	8,482	922	2,233
Clay	-	-	5	-	8,961	23	252	866	5,173	6,760	4,143	81	707
Collier	2	-	80	2	5,910	6,800	61	4	17,372	114	5,258	81	707
Columbia	-	-	35	1	3,809	4,943	31	2	7	2,457	3,430	2,640	9,032
Miami-Dade	51,686	1,153	123,752	70	39,046	17,367	76,238	14,898	57,737	73,542	54,753	771	3,934
DeSoto	-	-	9	-	1,400	1,501	11	1	1,098	6	2,504	922	2,233
Duval	4	-	14	-	953	1,084	4	1	0	542	963	922	2,233
Duval	4	-	55	2	54,874	53	1,235	6,282	61,759	28,138	29,357	922	2,233
Escambia	-	-	164	-	1,238	23	30,000	2	23,137	4	18	806	4,022
Bibb	-	-	152,444	-	45,883	-	14,816	3,285	5,076	9,467	13,039	811	31,945
Bleckley	-	-	12,801	-	2,949	-	963	207	759	407	613	73	109
Brantley	-	-	18,770	-	4,961	-	1,295	874	1,018	260	1,514	262	349
Brooks	-	-	15,494	-	4,268	-	1,559	312	284	1,557	556	362	3719
Bryan	-	-	38,128	-	5,286	-	1,377	1,034	678	280	1,917	147	5,760
Bulloch	-	-	76,981	-	14,531	-	3,798	3,408	2,009	881	4,435	14,874	169
Burke	-	-	22,409	-	6,855	-	2,174	1,803	708	253	1,917	549	14,874
Clay	-	-	3,670	-	1,196	-	1,196	178	1,103	989	204	146	204
Clinton	-	-	5,629	-	1,772	-	1,772	29	2,838	233	757	51	51
Coles	-	-	13,266	-	3,911	-	3,911	980	4,441	2,958	676	349	362
Cook	-	-	1,364,093	-	247,116	-	5,939	5,681	277,050	254,944	110,342	69,928	335,484
Crawford	-	-	4,320	-	1,399	-	1,399	59	1,329	1,203	330	147	5,760

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