MARKET ALERT | 02.19.19

Spotlight on the 2019 Medicare Advantage Annual Enrollment Period Results

BY KRISTI SKOWRON
ASSOCIATE, CLIENT ADVISORY

Late last week, CMS released the final Annual Enrollment Period (AEP) results data that details the most accurate 2019 Medicare Advantage (MA) enrollment information. Using our Pareto Spotlight solution, Pareto aggregated and analyzed the data to understand changes in enrollment and the impact of 2019 product strategies. The dashboard below provides an interactive analysis of the December 2018 and February 2019 data for users to explore shifts that occurred at both a state and national level. Note that the results below exclude PDP-only plans and cost plans, which is especially impactful to the transition away from cost plans in Minnesota.

2019 Medicare Advantage AEP Analysis

View the Interactive Dashboard →

Below are a few insights gained from compiling, analyzing, and studying the available data within these dashboards:

1. National plans continue to grab market share in 2019, with 1.2M+ new enrollees. Aetna dominated the market (25.2% growth), followed by Anthem (11.6%) and Humana (10.3%). Among the nationals, Centene experienced the lowest membership growth (1.21%), while Molina Healthcare, Magellan Health and AIDS Healthcare Foundation all saw slight reductions in membership.

2. Blues and Regional plans struggled to maintain market share despite increased membership numbers, with losses of 0.59% and 0.60%, respectively. Plans able to capture additional enrollment include Blue Cross and Blue Shield of Minnesota (88K) and Medica (25K), while the most significant losses were experienced by Horizon Blue Cross Blue Shield of New Jersey (-52K) and Medical Card System (-26K).

3. Strategies focused on IND PPO products brought forth a 14.1% enrollment change in 2019, as compared to the 4.1% growth seen in the products in 2018. The growth was driven primarily by a $0 Part C premium strategy by Aetna and Humana.

4. 2019 demonstrates similarities in market growth by geography, with a few key outliers in New Hampshire (35.9%) and New Jersey (26.2%), primarily concentrated in EGHP PPO products.

5. Aetna experienced the most growth in their EGHP PPO (34% growth) and IND PPO (28% growth) products.

Current Pareto Spotlight subscribers can log in and pull further insights from the 2019 Medicare Advantage AEP Results, including county-level and product-feature level results. If you are not a subscriber and would like to learn more about the Pareto Spotlight solution, please contact Duncan Wierengo at dwierengo@paretointel.com.