

Pulse of the Purchaser Fall 2024



Pulse of the Purchaser 2024 Survey

The [National Alliance of Healthcare Purchaser Coalitions](#) is conducting a survey of employers/purchasers to learn current perspectives, concerns and insights to address workforce environment, healthcare affordability, benefit design approaches, and health and well being strategies.

The survey should take no more than 15 minutes to complete. Individual respondents will be able to revise and revisit their answers prior to their formal submission. Respondents can receive the overall results by providing your email. All responses will be confidential.

If you are a member, please select which coalition(s) you are a member of:

- Alabama Employer Health Consortium
- The Alliance (Midwest)
- Business Health Care Group
- California Health Care Coalition
- Central Penn Business Group on Health
- Colorado Business Group on Health
- Connecticut Business Group on Health
- Dallas/Fort Worth Business Group on Health
- Economic Alliance for Michigan
- Employers' Advanced Cooperative on Healthcare
- Employer Coalition of Louisiana
- Employers' Forum of Indiana
- Employers Health Coalition of Idaho
- Employers Like Me
- Florida Alliance for Healthcare Value
- FrontPath Health Coalition
- Greater Cincinnati Employers Group on Health
- Greater Philadelphia Business Coalition on Health
- HealthCareTN
- Healthcare Purchaser Alliance of Maine
- Health Services Coalition
- Houston Business Coalition on Health
- Kansas Business Group on Health

- Kentuckiana Health Collaborative
- Lehigh Valley Business Coalition on Healthcare
- Mid-America Coalition on Health Care
- MidAtlantic Business Group on Health
- Midwest Business Group on Health
- Mississippi Business Group on Health
- Montana Association of Health Care Purchasers
- Nevada Business Group on Health
- New Hampshire Purchaser Group on Health
- New Mexico Coalition for Healthcare Value
- North Carolina Business Coalition on Health
- Northeast Business Group on Health
- Pittsburgh Business Group on Health
- Purchaser Business Group on Health
- Rhode Island Business Group on Health
- San Diego Purchasers Cooperative
- Savannah Business Group on Health
- Silicon Valley Employers Forum
- St. Louis Area Business Health Coalition
- Washington Health Alliance
- WellOK - The Northeastern Oklahoma Business Coalition on Health
- Other (none of the above)

Please select your organization's industry:

- Accommodation and Food Services
- Administrative and Support
- Agriculture, Forestry, Fishing and Hunting
- Arts, Entertainment and Recreation
- Construction
- Educational Services
- Federal, State, or Local Government
- Finance and Insurance
- Health Care and Social Assistance
- Information Technology
- Management of Companies and Enterprises
- Manufacturing
- Mining, Quarrying, and Oil and Gas Extraction
- Professional, Scientific, and Technical Services
- Real Estate, Rental and Leasing
- Retail/Wholesale Trade
- Transportation, Warehousing and Utilities
- Waste Management and Remediation Services
- Other

Which best describes the size of your organization?

- Fewer than 500 employees
- 500 - 999 employees
- 1,000 - 4,999 employees
- 5,000 - 9,999 employees
- 10,000 - 24,999
- 25,000 - 49,999
- 50,000+

In regard to the current workforce environment, to what extent do you agree with each the following statements:

	Strongly Agree	Agree	Disagree	Strongly Disagree
Rising healthcare costs impact our organization's competitiveness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Healthcare cost increases often lead to trade-offs with salary or wage increases	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Higher healthcare costs will result in further cost-shifting to employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attracting and retaining employees is a top priority	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Health and wellbeing benefits play a crucial role in our employee attraction and retention efforts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

In 2023, the average annual premium for fully insured employer-sponsored health insurance was \$8,435 for single coverage and \$23,968 for family coverage. Compared to these averages, how would you describe your overall healthcare spending in 2023:

- Higher than the average
- Lower than the average
- About the same as the average
- Not sure

Comments:

Which of the following threaten the affordability of employer-provided health coverage for employees and their families?

	Significant Threat	Minor Threat	No Threat/Positive Impact
Hospital prices	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Health system consolidation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
High-cost claims	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Drug prices	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of transparency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Surprise medical bills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Broker/consultant conflicts of interest	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
PBM conflicts of interest	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Health insurer conflicts of interest	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Which of the following health equity focused activities is your organization doing or considering to address health equity:

	Currently Doing	Considering Next 1-3 Years	Not Considering	Need more Information
Engaging various departments to discuss company strategy (e.g., diversity & inclusion, HR, benefits, wellbeing)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Analyzing health claims/outcomes data based on income levels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Analyzing health claims/outcomes data based on race/ethnicity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Analyzing health claims/outcomes data based on geographic location	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Analyzing health claims/outcomes data based on gender	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Surveying employees about perceived access to care, quality, and patient experience	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Currently Doing	Considering Next 1-3 Years	Not Considering	Need more Information
Stratifying employee survey results on perceived access, quality, and patient experience by sub-populations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Placing and measuring accountability for health equity in service provider contracts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Collecting qualitative data through focus groups	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

Which of the following areas of women's health is your organization doing or considering:

	Currently Doing	Considering Next 1-3 Years	Not Considering	Need more Information
Reproductive healthcare and fertility services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gynecological issues (e.g., endometriosis, cervical cancer)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maternity support services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Parental leave	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Menopause support and resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Caregiving assistance for dependents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mental health specific to women's health (e.g. menopause, postpartum depression) support	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Comments:

Which of the following mental health focused activities is your organization currently doing or considering:

	Currently Doing	Considering Next 1-3 Years	Not Considering	Need more Information
Offering programs that educate on mental health stigma/bias	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Offering dedicated mental health days	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Establishing vendor accountability (e.g., performance metrics)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Integrating behavioral health into in-network primary care services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Evaluating and promoting cultural competency and diversity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Embedding internal staff capacity to employees and families with onsite health expert (care navigator, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Comments:

Which of the following obesity management strategies is your organization currently doing or considering:

	Currently Doing	Considering Next 1-3 Years	Not Considering	Need more Information
Offering lifestyle programs (e.g., exercise and nutrition programs)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reduce bias and stigma through communications, messaging in programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Currently Doing	Considering Next 1-3 Years	Not Considering	Need no Informatic
Use of centers of excellence to address those with high level of obesity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coverage of bariatric surgery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coverage of branded GLP-1s for obesity (e.g., Zepbound, Wegovy)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coverage of compounded GLP-1s for obesity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coverage of other anti-obesity medications (e.g., Adipex)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Limiting access to GLP-1s to specific populations (e.g., BMI >30, chronic conditions)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Partnering with a point solution vendor to manage your access to GLP-1s (e.g., Found Health, Vida)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ensuring access to GLP-1s based on beneficiary lifestyle changes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

Which of the following best describes your primary PBM contract?

- One of the "Big Three" (e.g., CVS Caremark, Express Scripts, OptumRx)
- Transparent PBM
- other PBM (please specify which one)

Are you considering changing your PBM in the next 1-3 years?

- Yes
- No

Why are you considering changing your PBM?

In your relationship with your PBM, which of the following are you doing or considering:

	Currently Doing	Considering Next 1-3 Years	Not Considering	Don't Know/Need more Information
Full and independent audit rights of PBM contract and rebate agreements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ownership of all data generated by the health plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Removal of low-value drugs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Promotion and inclusion of biosimilars on formulary	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use of a value-based formulary versus a rebate-driven formulary	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Flexibility to customize formulary without financial penalties	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Full disclosure of all revenue streams with affiliated pharmacy-related entities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Complete transparency regarding net/ingredient cost by drug	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comprehensive definition of the term 'rebate' to include other revenue streams (e.g., access fees, credits)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Confirmation that advisors do not receive any direct or indirect compensation from PBM or related third-party	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inclusion of cell and gene therapies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Comments:

As a fiduciary, how confident are you in the following aspects of your broker or consultant:

	Confident	Somewhat Confident	Somewhat Concerned	Concerned	Need Inform
Reasonability of broker or consultant fees for the services provided	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Independence and lack of conflicts of brokers and consultants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

As a fiduciary, how confident are you in the following aspects of your medical TPA and hospital administration?

	Confident	Somewhat Confident	Somewhat Concerned	Concerned	Need Inform
Reasonability of medical TPA direct and indirect compensation for services provided	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Integrity and lack of conflicts in medical TPA administration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reasonability of hospital charges for the services provided	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Integrity and lack of conflicts in hospital billing practices	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

As a fiduciary, how confident are you in the following aspects of your PBM administration and compliance?

	Confident	Somewhat Confident	Somewhat Concerned	Concerned	Need Inform
Reasonability of PBM direct and indirect compensation for services provided	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Integrity and lack of conflicts in PBM administration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Compliance of your PBM with 6/1/2024 requirements for machine-readable files of contract rates for pharmacy services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Confident Somewhat Confident Somewhat Concerned Concerned Need Inform

Support of your PBM in meeting the above requirements

As a fiduciary, how confident are you in the following aspects of your TPA's compliance with current requirements and support for upcoming regulations?

Confident Somewhat Confident Somewhat Concerned Concerned Need Inform

Compliance of your TPA with mental health parity requirements as specified in [new proposed regulations](#)

Support of your TPA to provide the Comparison Price Tool as required by 1/1/2024

Support of your TPA to meet current requirements related to the elimination of gag clauses

Support of your TPA to meet current requirements for machine-readable files of all contracted rates for medical services



Comments:

In light of emergent hospital pricing transparency, to what extent do you agree with following:

Strongly Agree Agree Disagree Strongly Disagree Need m Informa

Hospital pricing practices are both reasonable and defensible

Hospital prices are justified by uncompensated care and negative margins on public programs (e.g., Medicaid, Medicare)

Hospital margins are both reasonable and defensible

	Strongly Agree	Agree	Disagree	Strongly Disagree	Need more Information
Market consolidation has improved cost and quality of services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hospitals generally operate efficiently	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
High quality hospitals are more expensive than low quality hospitals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hospitals are subject to market pressures similar to other sectors of the US economy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

In light of hospital pricing practices, our organization is considering the following:

	Currently Doing	Considering Next 1-3 Years	Not Considering	Need more Information
Direct contracting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Centers of excellence	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Site of care strategies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tiered networks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reference-based pricing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Advanced primary care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

Which of the following strategies does your organization deploy to address high-cost claims:

	Currently Doing	Considering Next 1-3 Years	Not Considering	Need more Information
Enhanced screening/early detection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Navigator/enhanced case management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Disease-specific vendor(s) (e.g., diabetes management, cancer)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Centers of excellence/bundles	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reducing risk of neonatal ICU claims (e.g., managed maternity, fertility benefits)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Confirming diagnosis with expert medical opinion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Negotiating and auditing hospital prices	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Requesting data and audits of large claims	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Promoting precision medicine for cancer treatment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Site of care redirection (e.g., home infusion)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Direct contracting with providers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Using captive reinsurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Purchasing stop-loss coverage for high-cost claims	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reviewing pharmacy claims run through the medical benefit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Carve out prior authorization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Non-traditional pharmacy procurement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Comments:

What is your impression of the following potential health reforms?

	Very Helpful	Somewhat Helpful	Neutral	Somewhat Hurtful	Very Hurtful	Need more information
Drug price regulation (e.g., capping list price of high-cost drugs)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
PBM reform (e.g., enhanced transparency, banning spread pricing, mandating rebate pass through to sponsors)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hospital price transparency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hospital rate regulation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hospital anti-trust enforcement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hospital anti-competitive practice regulation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Healthcare global budgets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
HSA reforms (e.g., allowing first-dollar coverage for primary care and chronic disease management)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Protecting ERISA pre-emption	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mental health parity requirements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shrinking the size of the 340B Program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Comments:

Related to the value of coalition membership:

What does your coalition do that provides the most value to you as an employer?

What can your coalition do to most support you over the next 12 months? (e.g., offer education on a certain topic, bring other employers together, etc.)

National Alliance has developed the following list of healthcare focused playbooks, guidebooks, and reports to support employers and coalitions. Please indicate your level of familiarity and usage:

	I use this resources and find it useful	I am aware of this resource but have not used it	I am not aware of this resource
Addressing Obesity through Holistic Design for Affordability and Sustainability Guidebook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Health Policy Document: Hearing Record Statement for 340B Drug Pricing Program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Addressing Pharmacy Benefit Management Misalignment Playbook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Setting the Record Straight: The Urgency of Achieving Hospital Fair Price Guidebook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hospital Price Transparency Playbook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rethinking How Employers Address High-Cost Claims Guidebook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employer Insights to Consolidated Appropriations Act Attestation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Behavioral Health Vendor Engagement Template	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Evaluating People-Centered Design Practices	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Which of the following resources do you find the most helpful?

- Webinars
- Guidebooks/playbooks
- Health policy documents
- Employer survey results
- Vendor engagement templates
- Action briefs
- Checklists

Last question block

Did you attend the [Pulse of the Purchaser Webinar Series](#) that discussed last year's survey results?

Yes

No

Please provide your email if you are interested in receiving the survey results:

Please provide your email:

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