



Aetna Provider Survey

Q1 2026

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Methodology and Fielding Dates

This quarterly study explores provider perceptions of the healthcare industry, challenges impacting patient care, confidence in the system, and opportunities for payer-provider collaboration.

Research Objectives

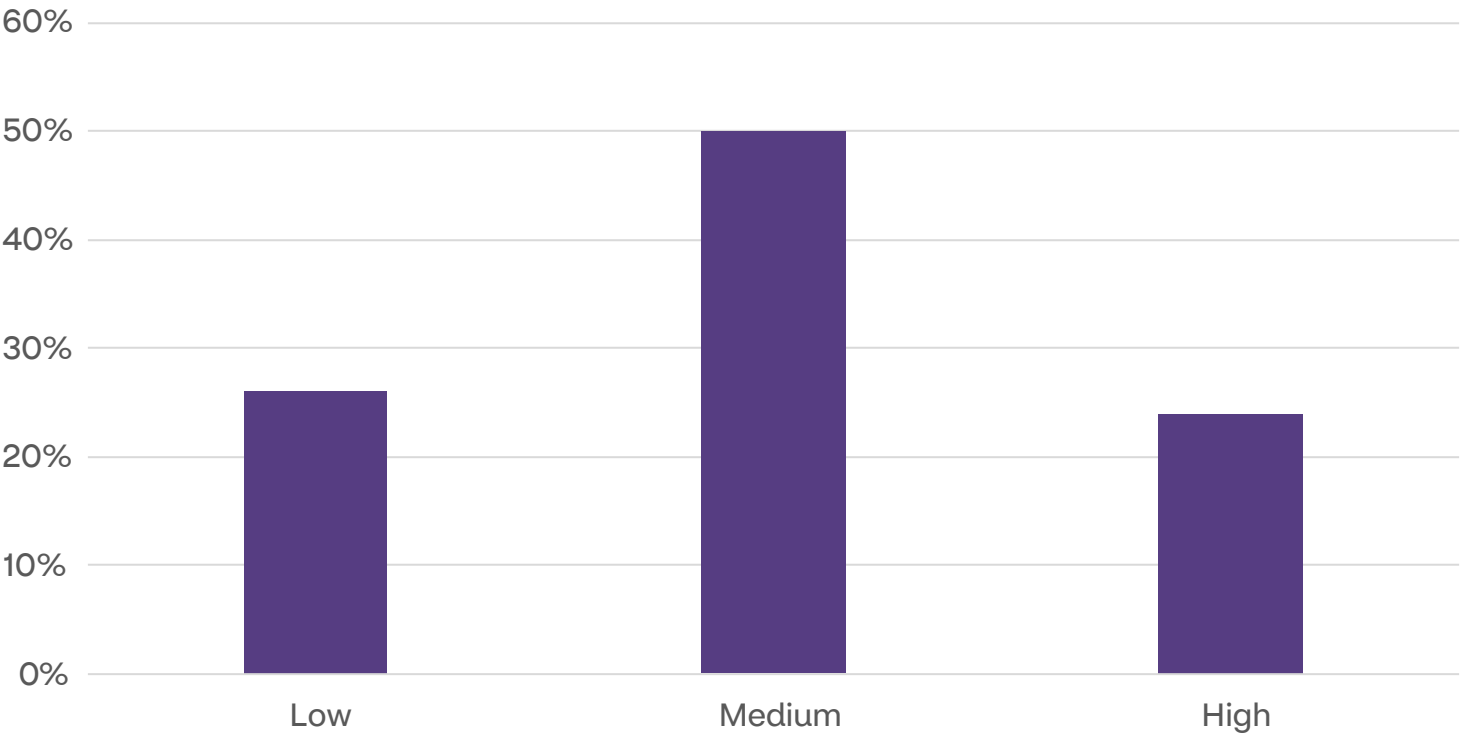
- Understand provider perceptions of the healthcare industry, including challenges impacting patient care
- Assess overall confidence in today's healthcare system and future outlook
- Evaluate trust levels and relationships with contracted payers
- Identify opportunities for collaboration and improvement

Methodology

- **Wave 1: Survey conducted February–March 2026 by Morning Consult**
- n=827 U.S. healthcare providers
- Overall margin of error: ± 3 percentage points

Provider Trust: Solid Footing, Room to Grow

Provider Trust in Contracted Payers (1-10 Scale)



5.4

Average Trust Score

1 in 4

High Trust (8, 9 or 10)

CVS13 - On a scale of 1-10, how much would you say you trust the insurance payers that you or your health system are contracted with? By 'trust,' we mean a combination of the following: Reliability: The payer consistently delivers on its promises (e.g., timely payments, accurate coverage). Quality: The payer provides clear, understandable information about coverage, costs, and policies. Doing what's right: The payer makes decisions that prioritize your (or your patients') health and well-being. Base: All Respondents (n = 827)

Trust and Delivery Gaps Remain

% Who Agree With Each Statement About Contracted Payers

44%

Prioritize patient
well-being

44%

Provide clear
coverage info

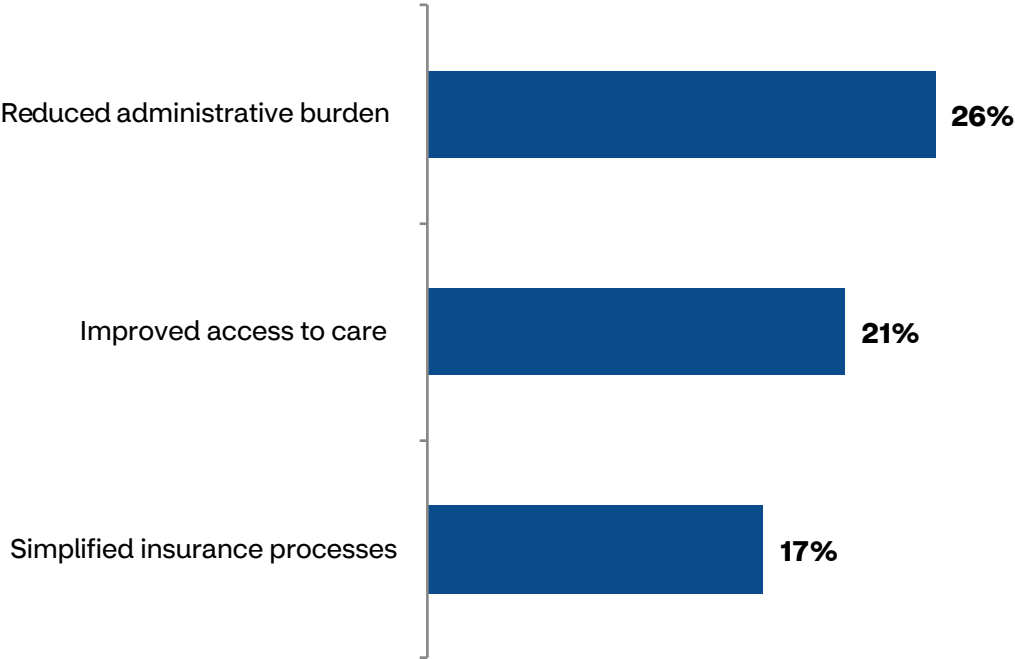
36%

Deliver on
promises

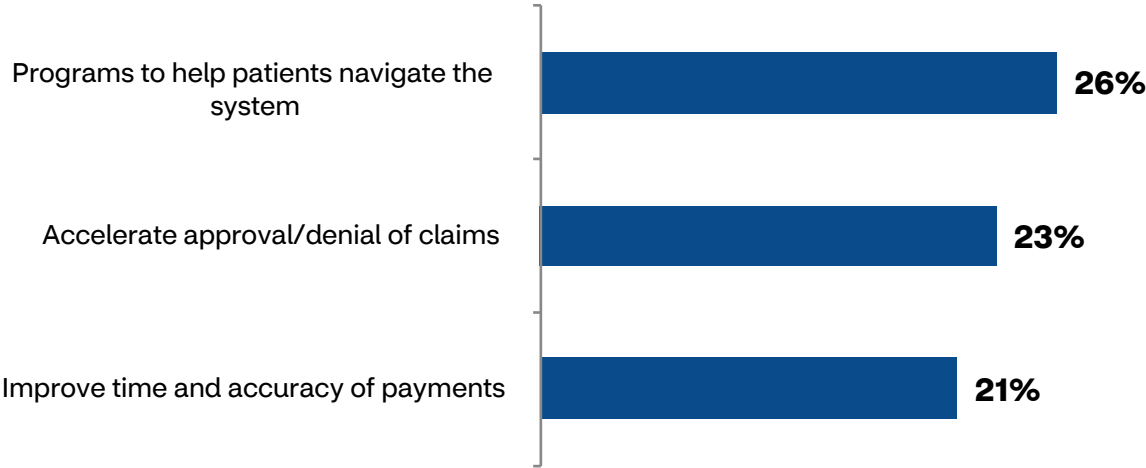
CVS14: 'The insurance payers my health system is contracted with consistently deliver on their promises (e.g., timely payments, meets deadlines, is responsive).'/CVS15: 'The insurance payers my health system is contracted with provide clear and understandable information about coverage, costs, and policies.'/CVS16: 'The insurance payers my health system is contracted with make decisions that prioritize the health and well-being of our patients.'/CVS17: 'The insurance payers my health system is contracted with makes decisions that help my patients navigate the health care system.' Base: All Respondents (827)

Reducing Administrative Burdens & Improving Patient Navigation Ranked as Top Priorities

One Thing to Change About The Healthcare System



Most Important Action Payers Could Take (% Selected)

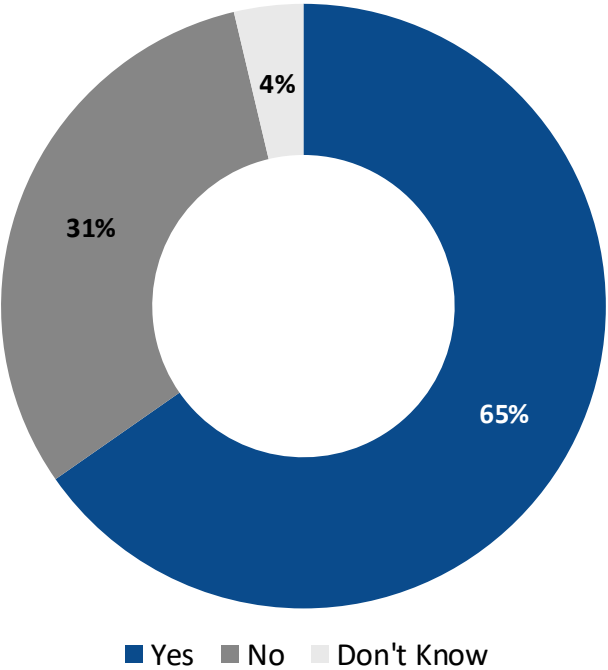


CVS3: If you could change one thing about the healthcare system today, what would it be?
Base: All respondents (n=827)

CVS19 - What is the most important action your contracted insurance payers could take to help address the challenges you or your hospital system face today? Base: All Respondents (827)

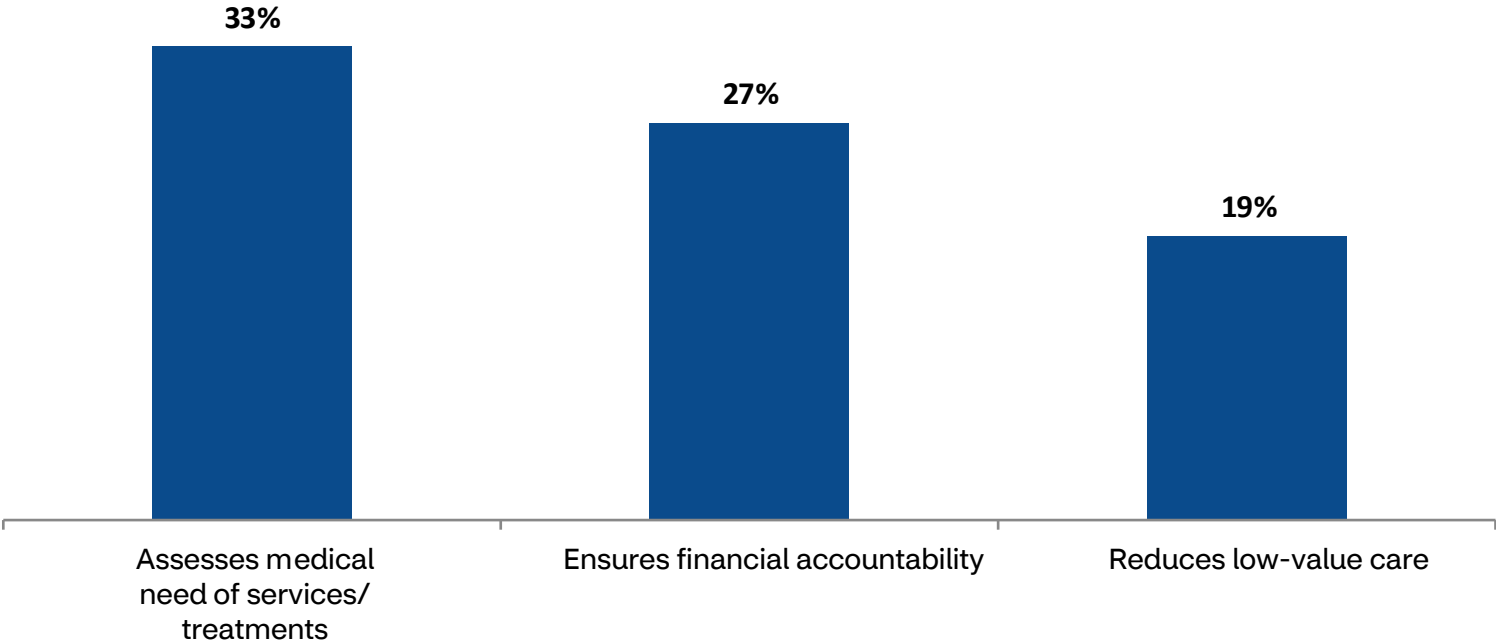
Majority Agree Prior Authorization (PA) Has a Role To Play

Does PA Have a Role in Healthcare?



CVS25: Do you believe prior authorization (PA) has a role to play in the healthcare system? Base: All Respondents (n = 827)

Biggest Benefit of the Prior Authorization Process (% Selected)



CVS24: What do you believe is the biggest benefit of the Prior Authorization process? Base: All Respondents (n = 827)

Provider Outlook: Optimism for the Future

% Who Believe the Healthcare System Is Capable of Each Improvement in the Next 5 Years

75%

Improving patient
experience

68%

Improving
population health

64%

Improving patient
navigation

CVS8: Do you believe the U.S. healthcare system is capable of measurably improving key population health outcomes (such as rates of chronic disease or life expectancy) in the next 5 years? /CVS9: Do you believe the U.S. healthcare system is capable of improving how patients navigate the healthcare system in the next 5 years? /CVS10: Do you believe the U.S. healthcare system is capable of improving patients' experience in the healthcare system in the next 5 years? Base: Total Respondents (n=827)

Providers Show Confidence in the Overall Healthcare System

Agreement With Statements About U.S. Healthcare in the Next 5 Years (% Agree)



CVS12: Please indicate whether you agree or disagree with the following statements about the future of U.S. healthcare in the next 5 years. Base: All respondents (n=827)

