

Asheville Market

Key Market Dynamics

- Mission Health and Duke LifePoint dominate the market, with the exception of Henderson County where AdventHealth and Margaret R. Pardee Memorial Hospital are the primary health systems
- There are meaningful independent specialty providers including American Oncology Partners and Digestive Health Partners
- Providers in the market have demonstrated a willingness to engage in more progressive value-based contracting arrangements

Blue Options Description

Geographic Footprint

The service area includes these counties:

- Buncombe
- Cherokee
- Clay
- Graham
- Haywood
- Henderson
- Jackson
- Macon
- Madison
- McDowell
- Mitchell
- Polk
- Rutherford
- Swain
- Transylvania
- Yancey

Percentage of PPO Providers in Blue Options¹

- 100% - In-Network Primary Care Providers
- 91% - In-Network Specialists
- 100% - In-Network General Acute Care Facilities
- 4 - Blue Distinction® Centers

Key Hospitals/Providers

- AdventHealth Hendersonville
- American Oncology Partners
- Atrium Health
- Digestive Health Partners
- Duke LifePoint
- Mission Health
- UNC Health

Charlotte-Concord-Gastonia Market

Key Market Dynamics

- Atrium Health and Novant Health dominate the market, with the exception of Gaston County where CaroMont is the primary health system
- There are meaningful independent specialty monopolies for orthopedic, ear, nose and throat (ENT), neurosurgery and nephrology
- Providers in the market have demonstrated a willingness to engage in more progressive value-based contracting arrangements

Blue Options Description

Geographic Footprint

The service area includes these counties:

- Anson
- Cabarrus
- Cleveland
- Gaston
- Iredell
- Lincoln
- Mecklenburg
- Rowan
- Rutherford
- Stanly
- Union

Percentage of PPO Providers in Blue Options¹

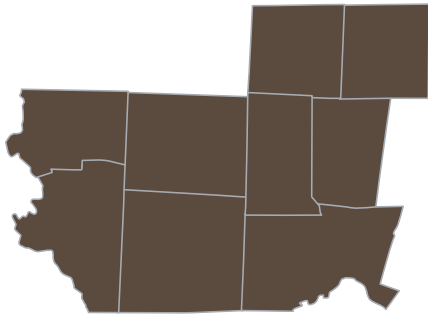
- 99% - In-Network Primary Care Providers
- 87% - In-Network Specialists
- 100% - In-Network General Acute Care Facilities
- 15 - Blue Distinction Centers

Key Hospitals/Providers

- Atrium Health
- Atrium Health Stanly
- Carolinas Medical Center
- CaroMont Health
- Duke LifePoint
- Levine Children’s Hospital
- Novant Health
- OrthoCarolina
- Tryon Medical Partners

¹ Blue Cross NC Internal Provider Data as of March 6, 2024.

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Greensboro-High Point Market

Key Market Dynamics

- Dominant health systems include: Atrium Health Wake Forest Baptist and Moses Cone
- Providers in the market have demonstrated a willingness to engage in more progressive value-based contracting arrangements

Blue Options Description

Geographic Footprint

The service area includes these counties:

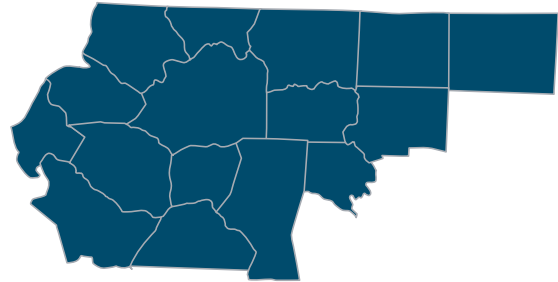
- Alamance
- Caswell
- Chatham
- Davidson
- Forsyth
- Guilford
- Orange
- Randolph
- Rockingham

Percentage of PPO Providers in Blue Options¹

- 100% - In-Network Primary Care Providers
- 90% - In-Network Specialists
- 100% - In-Network General Acute Care Facilities
- 9 - Blue Distinction Centers

Key Hospitals/Providers

- Atrium Health Wake Forest Baptist
- Bethany Medical Center
- Moses Cone Health System
- Novant Health
- UNC Health



Winston-Salem-Hickory Market

Key Market Dynamics

- The service area is very fragmented across several hospital systems and providers in the region

Blue Options Description

Geographic Footprint

The service area includes these counties:

- Alexander
- Alleghany
- Ashe
- Avery
- Burke
- Caldwell
- Catawba
- Davie
- Forsyth
- Iredell
- Rockingham
- Stokes
- Surry
- Watauga
- Wilkes
- Yadkin

Percentage of PPO Providers in Blue Options¹

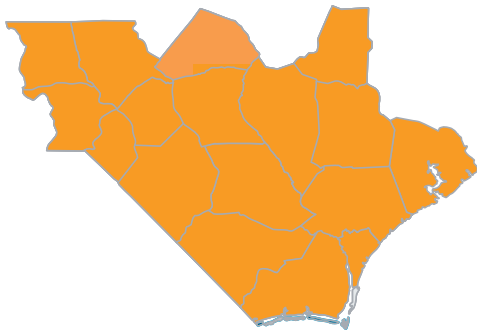
- 100% - In-Network Primary Care Providers
- 86% - In-Network Specialists
- 100% - In-Network General Acute Care Facilities
- 9 - Blue Distinction Centers

Key Hospitals/Providers

- Atrium Health Wake Forest Baptist
- Catawba Valley Health
- Duke LifePoint
- Hugh Chatham Memorial Hospital
- Iredell Health
- Novant Health
- Piedmont Healthcare
- UNC Health

¹ Blue Cross NC Internal Provider Data as of March 6, 2024.

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Fayetteville-Wilmington Market

Key Market Dynamics

- Major health systems within the Fayetteville-Wilmington market include Cape Fear Valley Health, Novant Health and First Health
- The market is mature with few independent hospital facilities
- Providers in the market have demonstrated a willingness to engage in more progressive value-based contracting arrangements; however, fee-for-service¹ contracting remains prevalent

Blue Options Description

Geographic Footprint

The service area includes these counties:

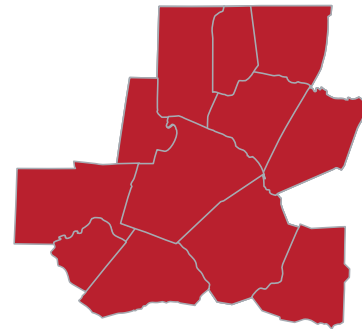
- Bladen
- Brunswick
- Columbus
- Cumberland
- Duplin
- Harnett
- Hoke
- Montgomery
- Moore
- New Hanover
- Onslow
- Pender
- Richmond
- Robeson
- Sampson
- Scotland
- Wayne

Percentage of PPO Providers in Blue Options¹

- 99% - In-Network Primary Care Providers
- 93% - In-Network Specialists
- 100% - In-Network General Acute Care Facilities
- 3 - Blue Distinction Centers

Key Hospitals/Providers

- Atrium Health
- Cape Fear Valley Health System
- ECU Health (formerly Vidant Health)
- First Health Clinics
- Goshen Medical Center
- Novant Health
- Wilmington Health



Raleigh-Durham-Cary Market

Key Market Dynamics

- Major health systems within the Raleigh market include: Duke Health, UNC Health and WakeMed
- Duke University Medical Center is a globally recognized, top-rated academic medical center, known for cutting edge therapies and services
- The market is mature with few independent hospital facilities
- Providers in the market have demonstrated a willingness to engage in more progressive value-based contracting arrangements; however, fee-for-service¹ contracting remains prevalent

Blue Options Description

Geographic Footprint

The service area includes these counties:

- Chatham
- Durham
- Franklin
- Granville
- Harnett
- Johnston
- Lee
- Nash
- Person
- Vance
- Wake
- Warren
- Wayne

Percentage of PPO Providers in Blue Options¹

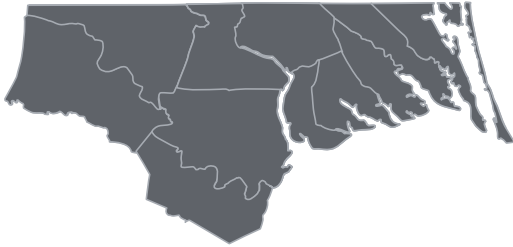
- 99% - In-Network Primary Care Providers
- 91% - In-Network Specialists
- 100% - In-Network General Acute Care Facilities
- 10 - Blue Distinction Centers

Key Hospitals/Providers

- Avance Care
- Cape Fear Valley Health System
- Duke LifePoint
- Duke University Health System
- EmergeOrtho PA
- UNC Health
- United Women's Health (UWH) of the Carolinas
- WakeMed WKCC Systems

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Elizabeth City Market

Key Market Dynamics

- The major health systems in this region include ECU Health, the largest system, and Sentara Albemarle Medical center, a smaller, independent system.
- Key specialty care, such as cardiology, neurology, etc., is largely controlled by ECU Health, who has opted to engage in more progressive value-based contracting arrangements.

Blue Options Description

Geographic Footprint

The service area includes these counties:

- Bertie
- Camden
- Chowan
- Currituck
- Gates
- Halifax
- Hertford
- Martin
- Northampton
- Pasquotank
- Perquimans

Percentage of PPO Providers in Blue Options¹

- 100% - In-Network Primary Care Providers
- 84% - In-Network Specialists
- 100% - In-Network General Acute Care Facilities
- 1 - Blue Distinction Center

Key Hospitals/Providers

- ECU Health (formerly Vidant Health)
- Sentara Albemarle Medical Center



Greenville Market

Key Market Dynamics

- The largest and most dominant system in this region is ECU Health, as well as some facilities that are part of the UNC, Novant or Duke-LifePoint systems.
- Key specialty care, such as cardiology, neurology, etc., is largely controlled by ECU Health, who has opted to engage in more progressive value-based contracting arrangements.

Blue Options Description

Geographic Footprint

The service area includes these counties:

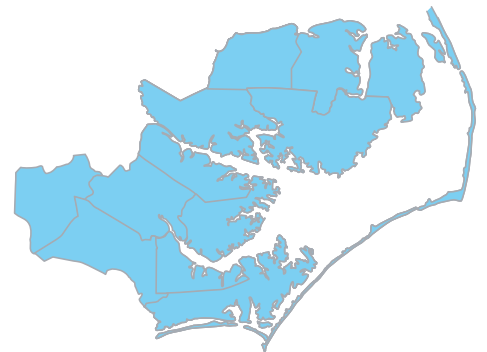
- Edgecombe
- Greene
- Nash
- Pitt
- Wayne
- Wilson

Percentage of PPO Providers in Blue Options¹

- 100% - In-Network Primary Care Providers
- 97% - In-Network Specialists
- 100% - In-Network General Acute Care Facilities
- 4 - Blue Distinction Centers

Key Hospitals/Providers

- Duke LifePoint
- ECU Health (formerly Vidant Health)
- Physicians East PA
- UNC Health



New Bern Market

Key Market Dynamics

- The largest and most dominant system in this region is ECU Health as well as Carolina East, a smaller, independent system, and some facilities that are part of the UNC system.
- Key specialty care, such as cardiology, neurology, etc., is largely controlled by ECU Health, who has opted to engage in more progressive value-based contracting arrangements.

Blue Options Description

Geographic Footprint

The service area includes these counties:

- Beaufort
- Carteret
- Craven
- Dare
- Hyde
- Jones
- Lenoir
- Pamlico
- Tyrrell
- Washington

Percentage of PPO Providers in Blue Options¹

- 100% - In-Network Primary Care Providers
- 82% - In-Network Specialists
- 100% - In-Network General Acute Care Facilities
- 3 - Blue Distinction Centers

Key Hospitals/Providers

- CarolinaEast Medical Center
- Coastal Carolina Health Care PA
- ECU Health (formerly Vidant Health)
- Physicians East PA
- UNC Health

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