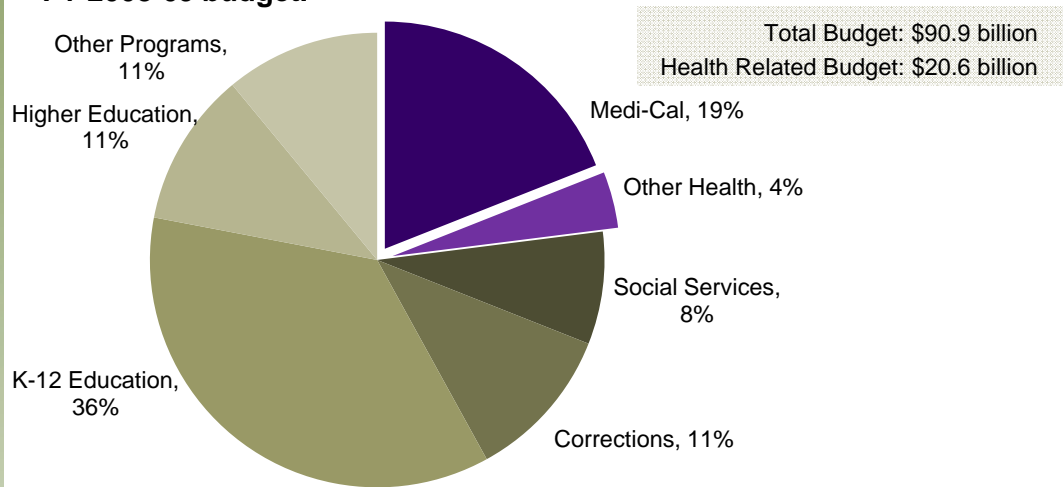


Market and Policy Monitor: Environment

March 2010

Health spending represents almost one-quarter of California's FY 2008-09 budget.



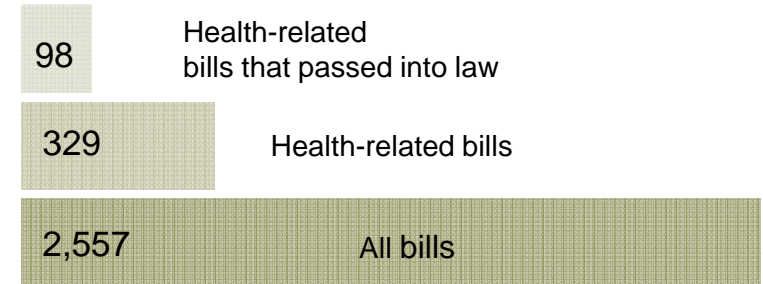
Source: CHCF estimates based on LAO (Jan 2010), Historical Expenditures and CDHCS, Medi-Cal Local Assistance Estimates (May 2009).

Awareness of physician ratings has increased, but only about one-quarter of Californians report having seen provider quality ratings.

Quality Ratings	Saw Rating Information	
	2004	2007
Hospital Ratings		
All respondents	23%	23%
Hospitalized in last two years	28%	30%
Physician Ratings		
All respondents	14%	22%
In fair/poor health	14%	26%

Source: Harris Interactive survey of Californians.

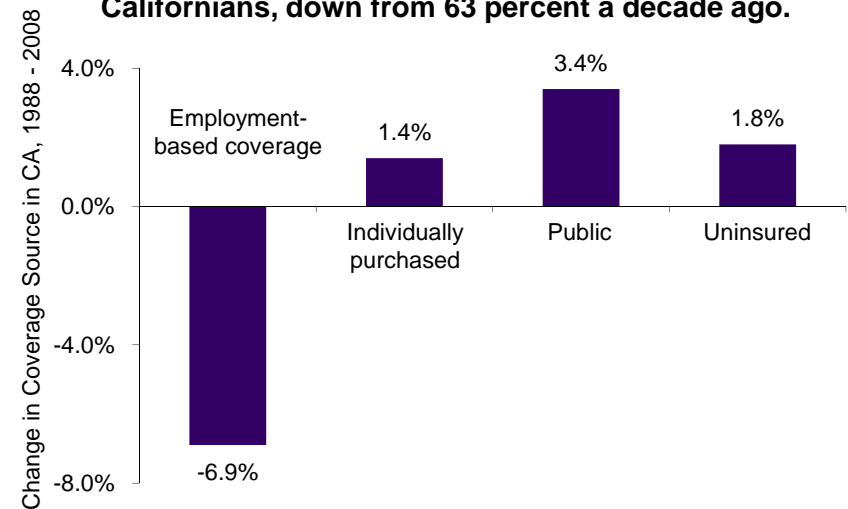
The California Legislature considered over 300 health-related bills* in 2009.



*Excludes bills related to public health, the environment, social services, and insurance services and practices.

Source: StateNet, 2009-10 (Year 1 of two-year cycle).

Employment-based insurance covers 56 percent of Californians, down from 63 percent a decade ago.

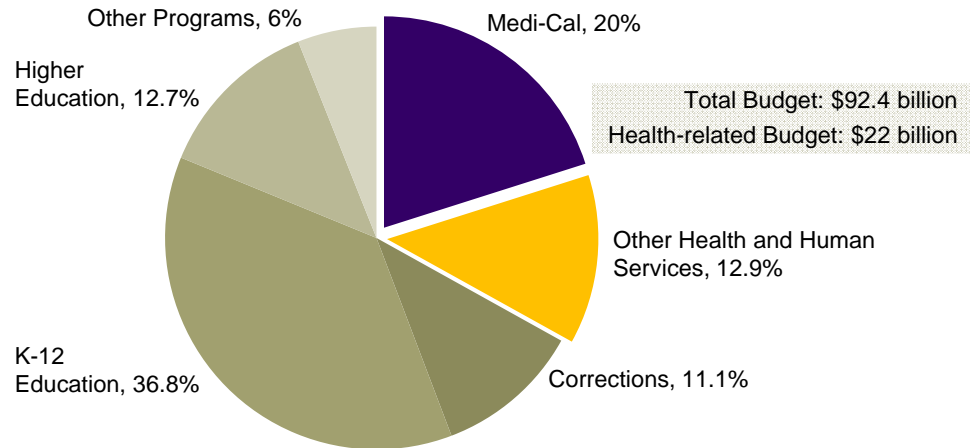


Source: Employee Benefit Research Institute.

Market and Policy Monitor: Environment

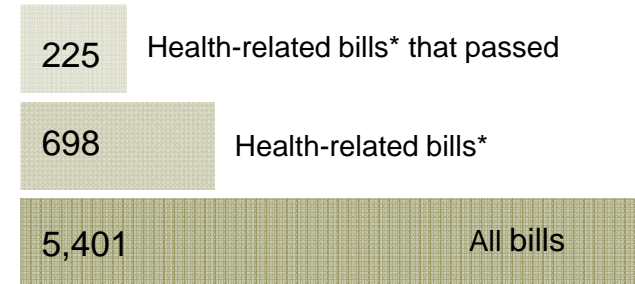
April 2009

California Budget Distribution, FY 2008-09



Source: LAO, Historical Expenditures and CDHCS, Medi-Cal Local Assistance Estimates.

Legislation in California, 2007-08 (Two-year Cycle)



*Excludes bills related to public health, the environment, social services, and insurance services and practices.

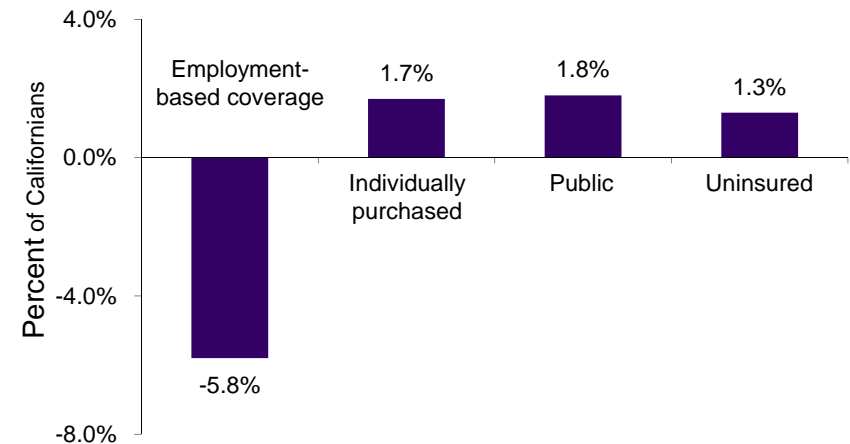
Source: StateNet.

Consumer Response to Quality Ratings

Quality Ratings	Saw Rating Information	
	2004	2007
Hospital Ratings		
All respondents	23%	23%
Hospitalized in last two years	28%	30%
Physician Ratings		
All respondents	14%	22%
In fair or poor health	14%	26%

Source: Harris Interactive survey of Californians, 2004, 2007.

Changes in Coverage Source in California, 1988 - 2007



Source: Employee Benefit Research Institute.