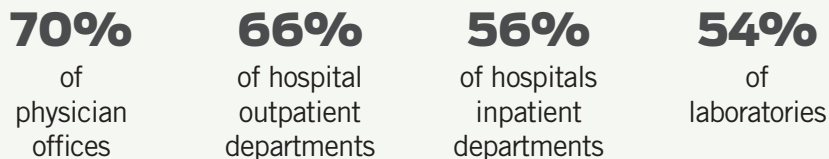


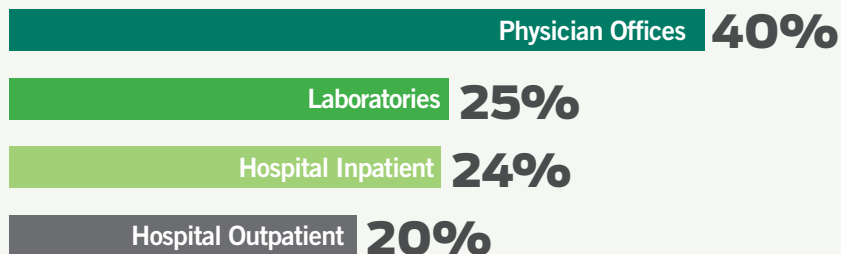
# Insurance Deductibles Are New Driver of Seasonal Volume

**ABOUT** In Q1 2016, HIDA investigated a spike in fourth quarter medical supply spending reported by our members and their customers. We conducted seven primary research studies of providers, including hospitals, physician offices, laboratories, and skilled nursing facilities, and conducted a literature review to understand this emerging phenomenon.

## Providers Reporting Q4 Volume Increase in 2015

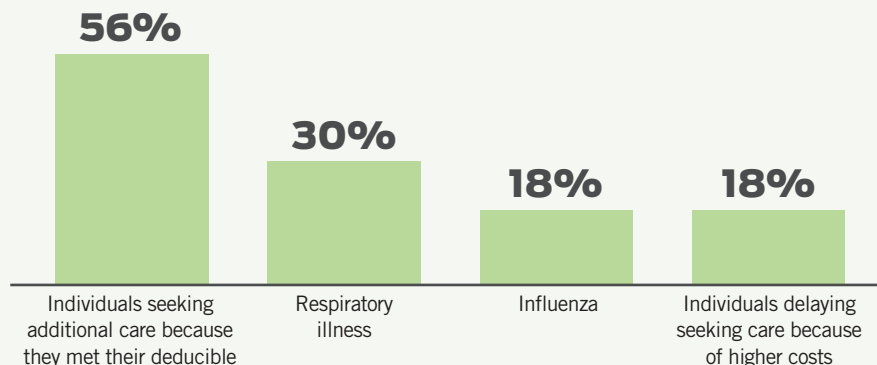


## % With Volume Increase +6% Or More



## Insurance Seen As Leading Cause of Q4 Volume Increase

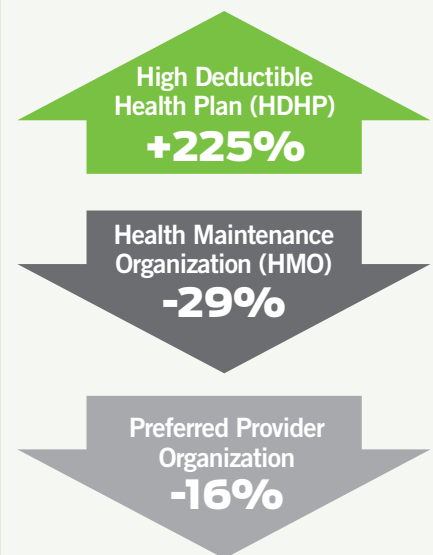
Provider Reported Reasons for Q4 2015 Volume Increase



Source: HIDA Research & Analytics, 2016

## More Consumers Face High Deductibles:

Change in employer-sponsored plan enrollment: 2009–2014



## Provider Reported Reasons for Q1 2016 Volume Increase

