

Seasonal Trends

Influenza, HDHPs to Impact 4Q16-1Q17

ABOUT HIDA's Research and Government Affairs departments have been tracking two factors that will strongly influence provider demand over the next two quarters: preparation for the next influenza season, and the impact of increased out-of-pocket expenses on patient seasonal demand.

CDC Recommends Against Nasal Spray Vaccine

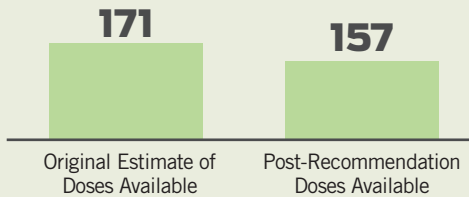


Originally expected to be **8%** of Total Vaccine Production



Usually accounts for **1/3** of all vaccines given to children

Change Left Gap of
14 Million Doses

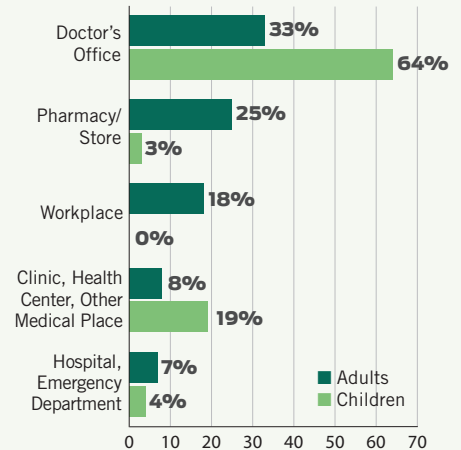


Manufacturers are working with CDC to ensure enough doses are available for upcoming flu season.



Physician Offices Remain Top Site for Flu Vaccine

Top 5 Sites for Receiving Flu Vaccine by Percentage



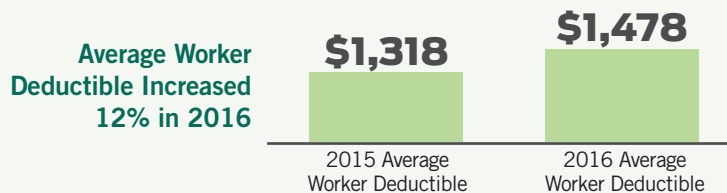
"Providers all are becoming very expensive, even with insurance."

– Female, Baby Boomer, South
2016 Horizon Report, Patient Satisfaction

Healthcare Expenses Have Continued to Increase



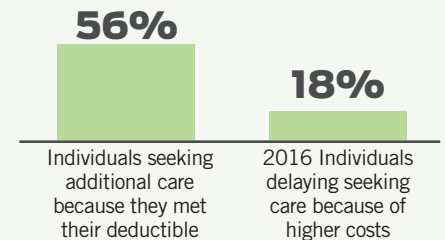
Half of all covered workers have deductibles of \$1,000 or more



27% of Medicare/Medicaid patients report paying more out-of-pocket compared to last year

Rising Costs Change Patient Behavior

Provider Reported Reasons for Increased Volume in Q4 2015



Sources: Health Industry Distributors Association (HIDA) 2016-16 Influenza Vaccine Production & Distribution Market Brief, 2016 HIDA Horizon Report: Seasonality of Demand, Kaiser Family Foundation, 2016 Employer Health Benefits Survey