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
  - Original Estimate of Doses Available: 171
  - Post-Recommendation Doses Available: 157
- 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

- Doctor’s Office: 64%
- Pharmacy/Store: 25%
- Workplace: 18%
- Clinic, Health Center, Other Medical Place: 19%
- Hospital, Emergency Department: 19%

“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
- Average Worker Deductible Increased 12% in 2016
  - 2015 Average Worker Deductible: $1,318
  - 2016 Average Worker Deductible: $1,478
- 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

- 56% Individuals seeking additional care because they met their deductible
- 18% 2016 Individuals delaying seeking care because of higher costs

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