Adult and Maternal Annual Vaccination Trends in the US

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Executive Summary

Objectives

Understand the impact of COVID19 on routine adult (Influenza, Pneumococcal, Shingles , Covid) and Maternal (Tdap, RSV) vaccinations

Data Sources

Patient level data* representing both private (commercial) and public (Medicare FFS, Medicare Advantage, Medicaid FFS, Managed Medicaid, and cash) insurers across all 51 states of the US

Study Population

Population of ~258M adults (age 18+); cohort of eligible patients of ~60M for tracking vaccinations.
Vx rate calculated as number of adults who received each vaccine out of eligible adults, and aligned with US population[1]

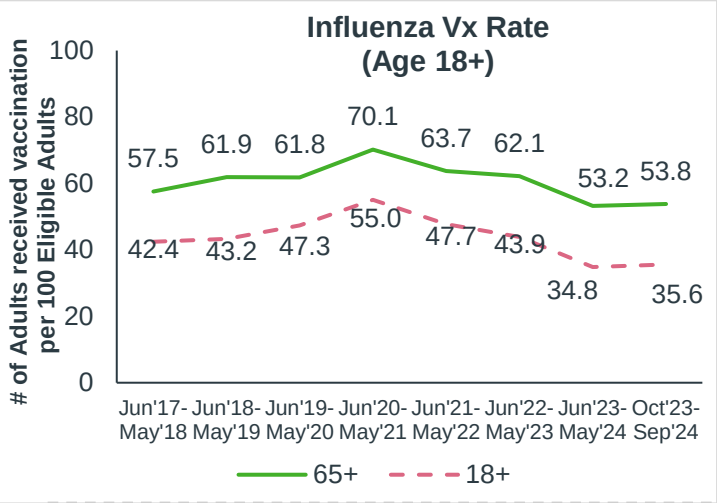
Key Findings and Insights

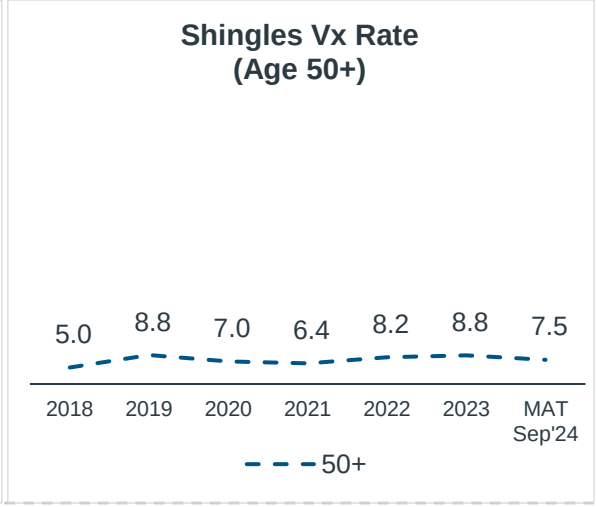
- Influenza Annual Vx rates declined post 2021, while Pneumococcal and Shingrix improved in 2022, and is reaching/exceeding pre-pandemic levels (2019)
- Overall reduction in Influenza Annual Vx rates across age groups, especially age 65+ and public insurance, with trends widening among Black/Hispanic vs. White/Asian and lower income groups
- Shingles Annual Vx rates for age 65+ increased in Q1’2023 coinciding with the implementation of the Inflation Reduction Act
- Pneumococcal Annual Vx rates among age 65+ declined during the pandemic, but now catching up to pre-pandemic levels, with trends widening among Public vs Private payor types.
- Tdap Annual Vx rates in pregnancy significantly lower among public insured, with trends widening among Black/Hispanic vs. White/Asian and lower income groups

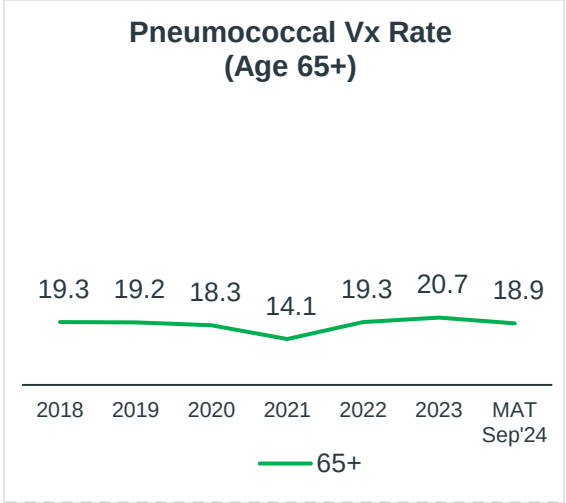
*IQVIA Administrative claims data and Experian consumer data with access to social determinants of health variables
[1]Pregnant women vaccination is based on IQVIA claims sample and not aligned to US population

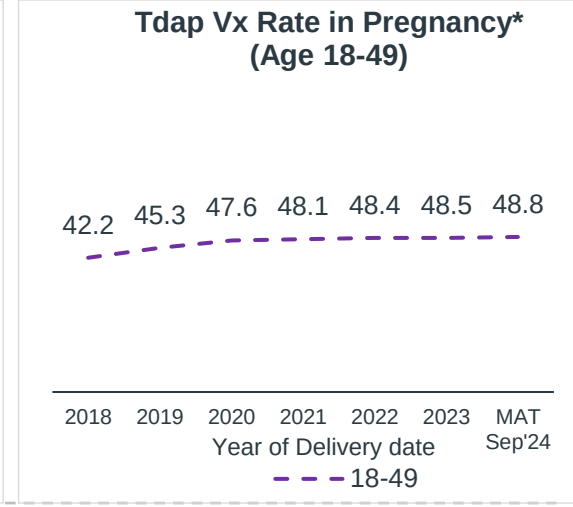
Summary of Adult and Maternal Annual Vx rate (as of Sep'24)

Annual Vx rate = # of Adults who received a vaccine per 100 Eligible Adults









- Across the board increase of ~0.8% during MAT Sep'24 vs. MAT May'24
  - Blacks (1.0%) and Hispanics (0.5%) had lowest Annual Vx rates vs. national average
  - Annual Vx rates among individuals with private payors had similar increase of 0.8% vs. public payors

- Shingles Annual Vx rate has shown 1.3% decrease during MAT Sep'24 vs 2023
- Annual Vx rates among individuals with public payors has not recovered post pandemic (10.1% in 2019 vs 7.8% in MAT Sep'24)

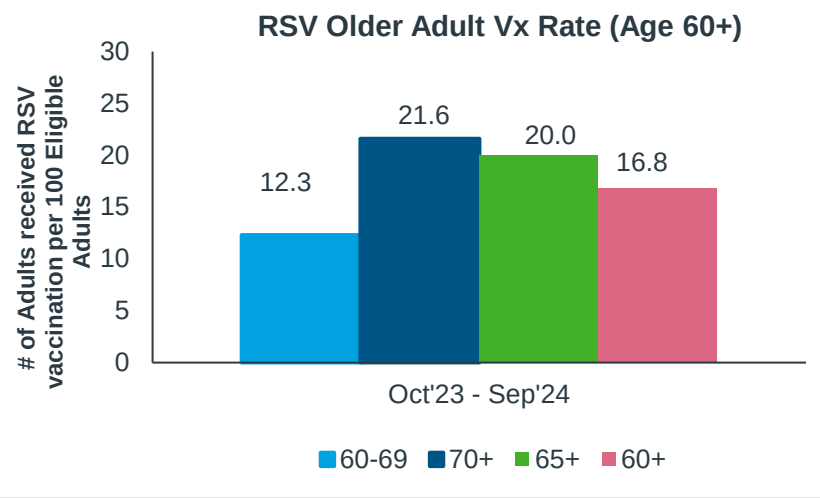
- Improvements in Pneumococcal Annual Vx rates in the most recent year, primarily driven by
  - Age based recommendation vs shared clinical decision making
  - Increased options, given launch of 2 newer vaccines
  - Increases in both public and private channel in 2022 and 2023

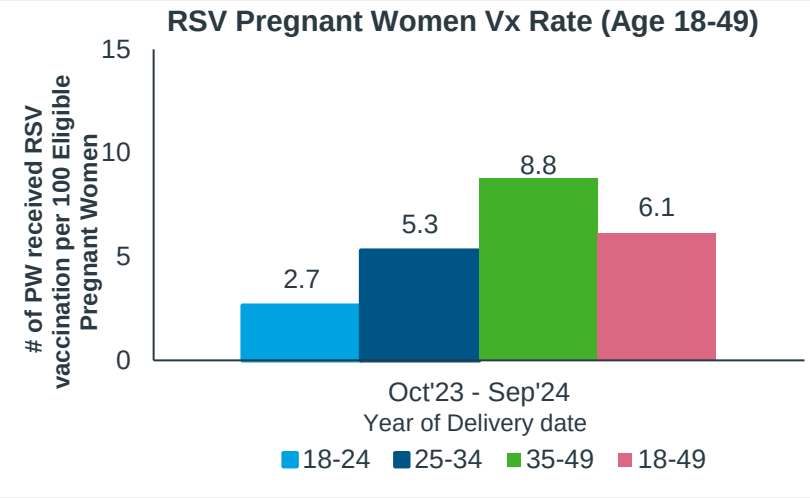
- Tdap Annual Vx rate among Pregnant Women* has increased slightly in MAT Sep'24 compared to 2023
- Vx rate have increased during MAT Sep'24, by ~0.3% compared to 2023 driven by 18-34 age group

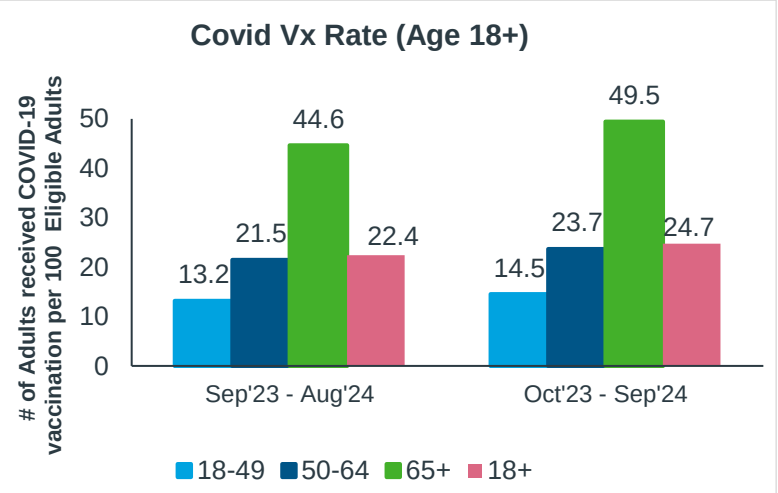
Sources: IQVIA LAAD and Experian Data. Annual Vx rate = Population received vaccination/Eligible Population
*Pregnant Women (PW) cohort is based on 'Delivery date';

Summary of RSV and Covid Vx rate (as of Sep'24)

Annual Vx rate = # of Adults who received a per 100 Eligible Adults







- RSV Vx rate among 60+ older adults was 16.8% between Oct'23-Sep'24
- RSV Vx rate for Private channels was 24.1% vs 8.8% in Public channels
- The Vx rate is higher in Asian and White population as compared to Hispanic and Black ethnicities

- RSV Vx rate among 18-49 Pregnant women was 6.1% between Oct'23-Sep'24
- RSV Vx rate for Pregnant women for Private channels was 7.1% vs 2.8% in Public channels
- The Vx rate is higher in Asian and White Pregnant women population as compared to Hispanic and Black ethnicities

- Covid Vx rate among 18+ adults was 24.7% in Oct'23-Sep'24
- Covid Vx rate among 18+ adults for Private channels was 23.4% vs 29.3% in Public channels in Oct'23-Sep'24
- The Vx rate is higher in Asian and White Pregnant women population as compared to Hispanic and Black ethnicities

Sources: IQVIA LAAD and Experian Data. Annual Vx rate = Population received vaccination/Eligible Population

National Prescription Audit (NPA) – There has been an increase in volume of vaccines administered nationally for Tdap and Pneumococcal in 2025 season compared to 2024

2025 season vs 2024 season**

Vaccine Market (# of vaccines administered)	2025 Season*	2024 season*	% Change
Influenza	39.03M	39.79M	-2%
Shingles	3.45M	4.56M	-24%
Pneumococcal	2.16M	1.98M	9%
Tdap	2.28M	1.68M	36%
RSV	3.23M	9.54M	-66%
COVID	27.59M	31.0M	-11%

Sources: Rx Weekly NPA data ending 01/24/2025
*2025 Season starts from Aug-2024 through 01/24/2025
*2024 Season starts from Aug-2023 through 01/26/2024

Thank You!