



Immunity in Focus *US Trends in Adult Immunization*

Nandini Selvam, PhD, MPH
Vice President & General Manager
IQVIA Government Solutions, Inc.

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Executive Summary

Objectives

Understanding trends in routine adult (Influenza, Pneumococcal, Shingles, RSV, 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 and audit trail data across retail pharmaceutical sales

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 population¹

*IQVIA Administrative claims data and Experian consumer data with access to social determinants of health variables;

¹Pregnant women vaccination status is based on IQVIA claims sample and not aligned to US population

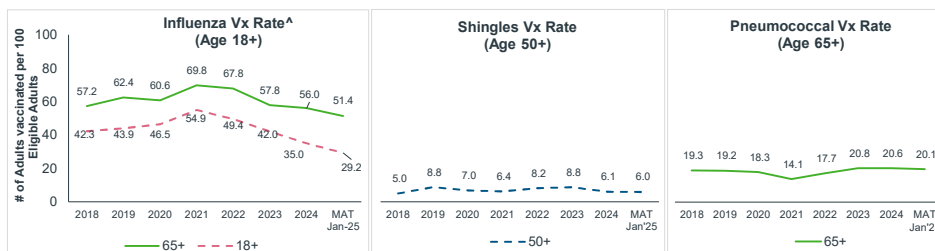
** MAT (moving annual total), 2025 currently reflects data from 1/2024-1/2025, which is only marginally different than the 2024 calendar view. A clearer view of 2025 will emerge as additional monthly 2025 data becomes available



2025 National Adult and Influenza Immunization Summit – 5/13/25

Summary of Adult Annual Vx rate (as of Jan'25)

Annual Vx rate = number of adults who received each vaccine per 100 eligible adults



- Across the board decrease of ~4.6% among 65+, and 5.8% for 18+ during MAT Jan'25 vs. 2024 season.
- Blacks and Hispanics had lowest annual Vx rates vs. Whites, Asians & Others.
- Annual Vx rates decreased among individuals covered by private payors by 6.4%, and public payors by 4.3% in MAT Jan'25 as compared to 2024 season.

- Shingles annual Vx rate has shown minor decrease of 0.1% during MAT Jan'25 vs 2024
- Annual Vx rates among individuals has not recovered post pandemic - 8.8% in 2019 vs 6.0% in MAT Jan'25

- Pneumococcal annual Vx rate had a minor decrease of 0.5% during MAT Jan'25 vs 2024
- Improvements in pneumococcal annual Vx rates in the most recent years.
- Decreases in both public and private channel by 0.6% in MAT Jan'25 vs 2024

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

^APregnant Women (PW) cohort is based on 'Delivery date';

^AX-axis labels for Influenza Vx Rate show complete Influenza season (Aug-Jul) represented as the Year of Jul when Influenza season ends

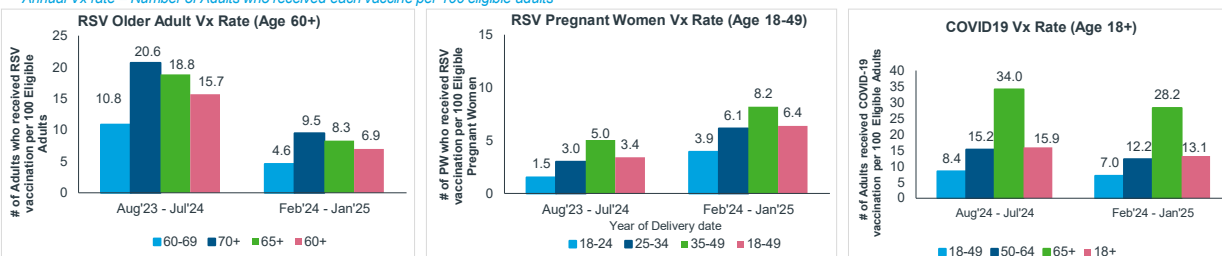
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2

Summary of RSV and COVID Vx rate (as of Jan'25)

RSV and COVID Vx rates show declining trends

Annual Vx rate = Number of Adults who received each vaccine per 100 eligible adults



- RSV Vx rate among 60+ declined from 15.7% (Aug'23–Jul'24) to 6.9% (Feb'24–Jan'25).
- 70+ show the highest vaccination rates among all older adults.
- Vaccination rates are higher among Asian and White populations compared to Hispanic and Black populations.
- Uptake is notably higher under private insurance compared to public payors, suggesting differences in provider access.

- RSV vaccination rate among pregnant women aged 18–49 increased from 3.4% (Aug'23–Jul'24) to 6.4% in Feb'24–Jan'25.
- Pregnant women insured through private payors had a 7.1% vaccination rate versus 4.2% among those using public channels.
- RSV vaccination rates in pregnancy are higher among Asian and White vs. Hispanic and Black.

- COVID-19 vaccination rates among 18+ declined from 15.9% (Aug'23–Jul'24) to 13.1% in Feb'24–Jan'25, highlighting a potential drop in engagement or access.
- Public insurance channels reported a 15.2% vaccination rate, surpassing 12.5% in private channels.
- Vaccination rates are notably higher in Asian and White populations compared to Hispanic and Black.

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

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3

Audit Trail data across Retail channels

National Prescription Audit (NPA)

Vaccine Market (# of vaccines administered)	2025 Season – Aug'24 – 04/11/2025 (in Millions)	2024 Season – Aug'23 – 04/12/2024 (in Millions)	% Change
COVID	29.2	33.2	-12%
Influenza	40.4	40.4	-0.1%
RSV	3.8	10.6	-64%
Vaccine Market (# of vaccines administered)	MAT 2025 – 04/12/2024 – 04/11/2025 (in Millions)	MAT 2024 – 04/07/2023 – 04/05/2024 (in Millions)	% Change
Shingles	6.8	8.8	-23%
Pneumococcal	3.5	3.0	17%
Tdap	4.2	3.3	26%

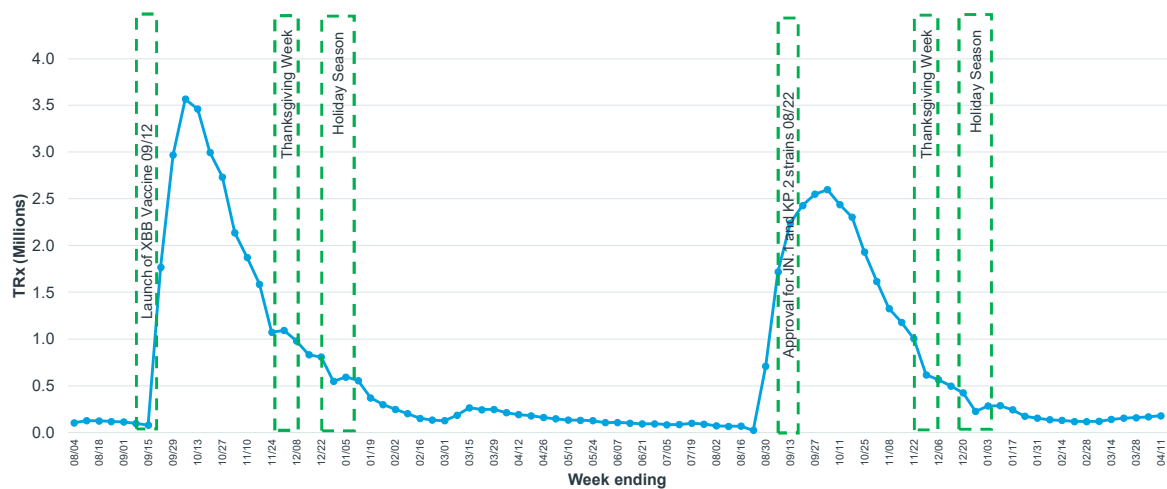
Sources: Rx Weekly NPA data ending 04/11/2025

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4

COVID Vaccine Weekly NPA Total Rx Volume

~12% decrease in the # of COVID vaccines administered in 2025 season vs. 2024 season



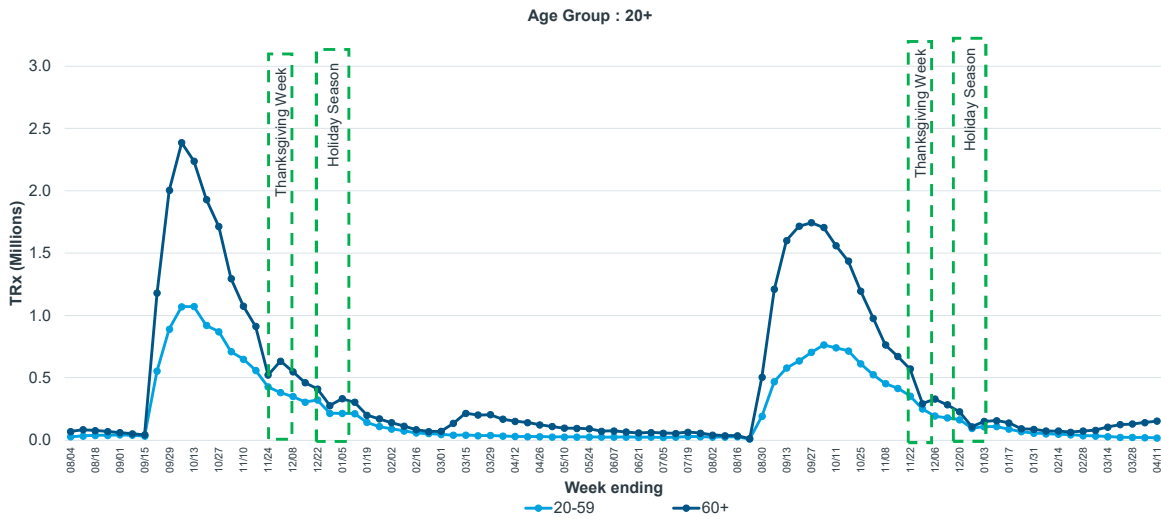
Sources: Rx Weekly NPA data from the week ending 08/04/2023 till the week ending 04/11/2025

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5

COVID Vaccine Weekly NPA Total Rx Volume – by Age Group

Vaccine uptake among 60+ is consistently better than the younger population

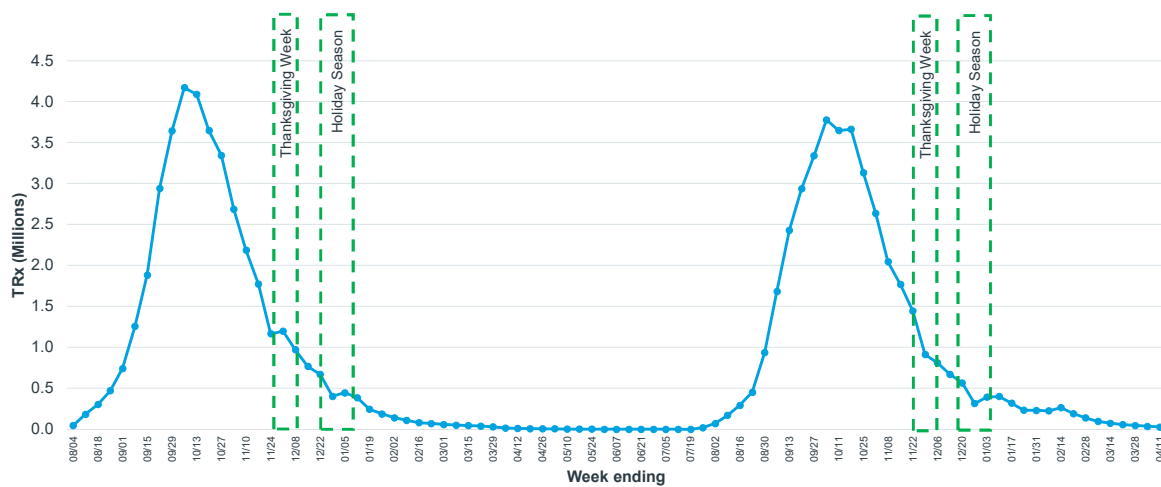


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6

Influenza Vaccine Weekly NPA Total Rx Volume

The # of influenza vaccines administered in 2025 season decreased by ~0.1% vs. 2024 season

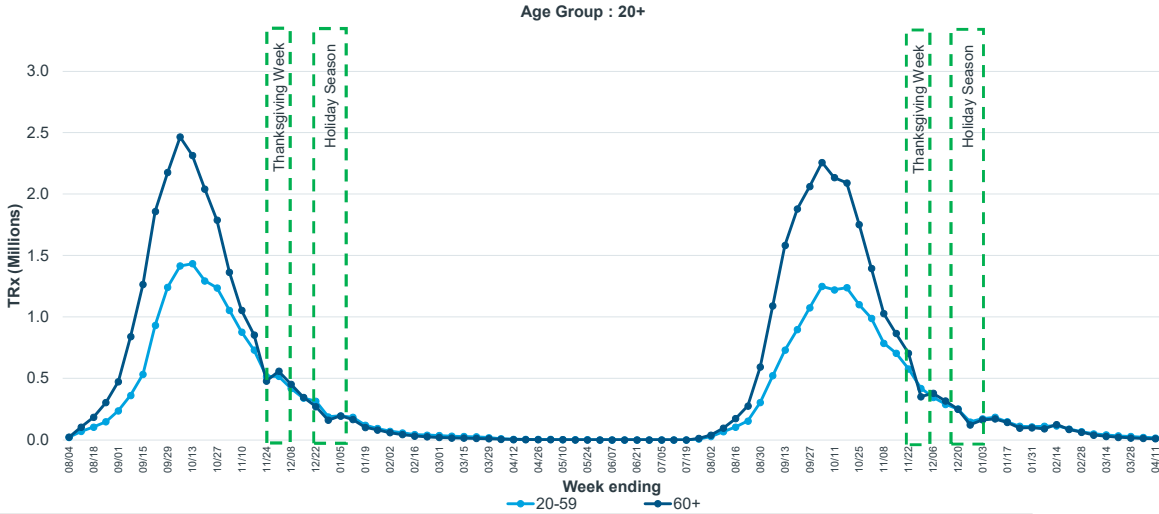


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7

Influenza Vaccine Weekly NPA Total Rx Volume – by Age Group

Influenza vaccine administrations peak mid August - October

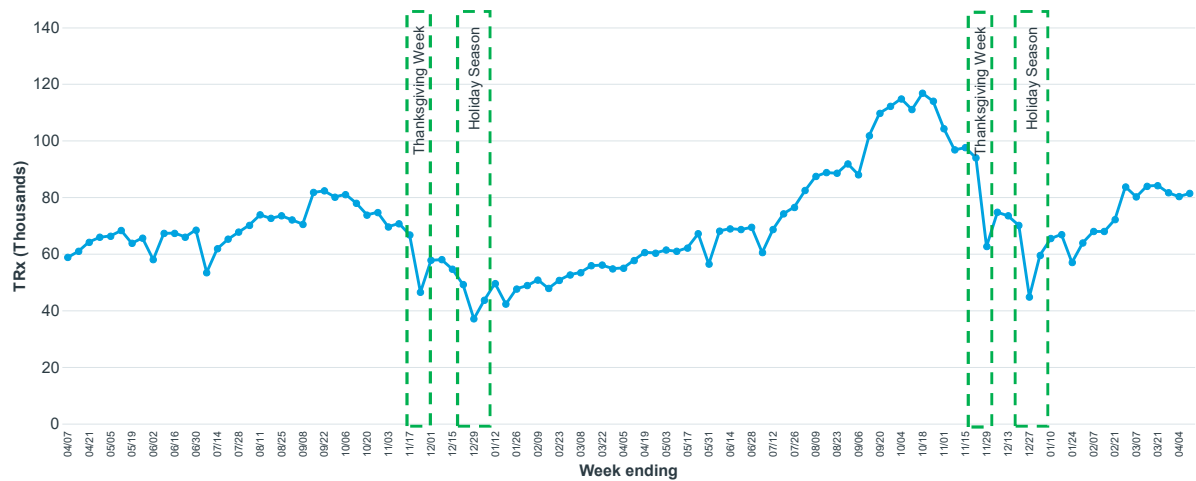


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8

Tdap Vaccine Weekly NPA Total Rx Volume

Tdap vaccines improved by ~26% in MAT 2025 vs. MAT 2024

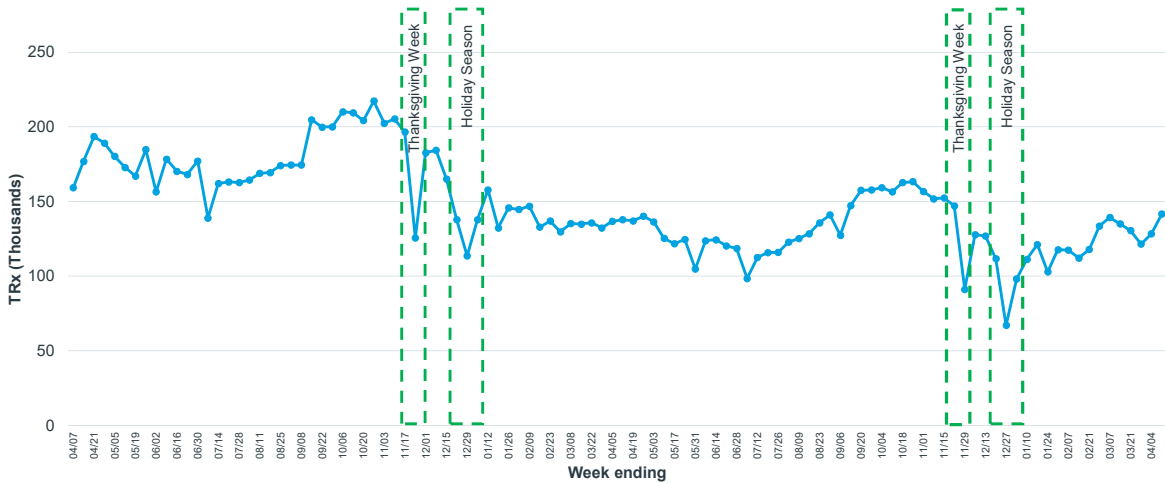


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9

Shingles Vaccine Weekly NPA Total Rx Volume

Shingles vaccines dropped by ~23% in MAT 2025 vs. MAT 2024



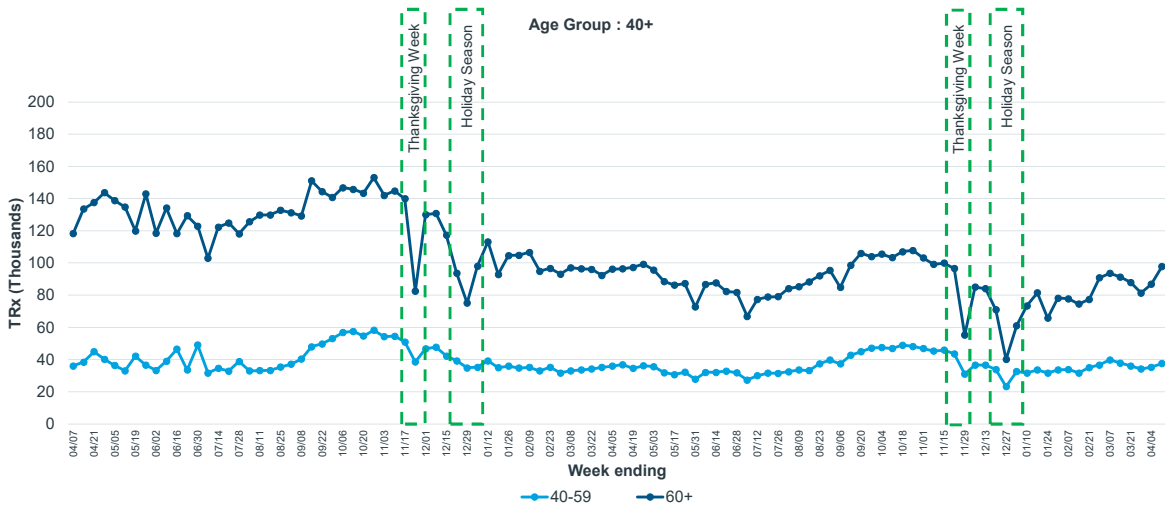
Sources: Rx Weekly NPA data from the week ending 04/07/2023 till the week ending 04/11/2025



10

Shingles Vaccine Weekly NPA Total Rx Volume – by Age Group

Shingles Vaccine administration is higher for 60+ age group



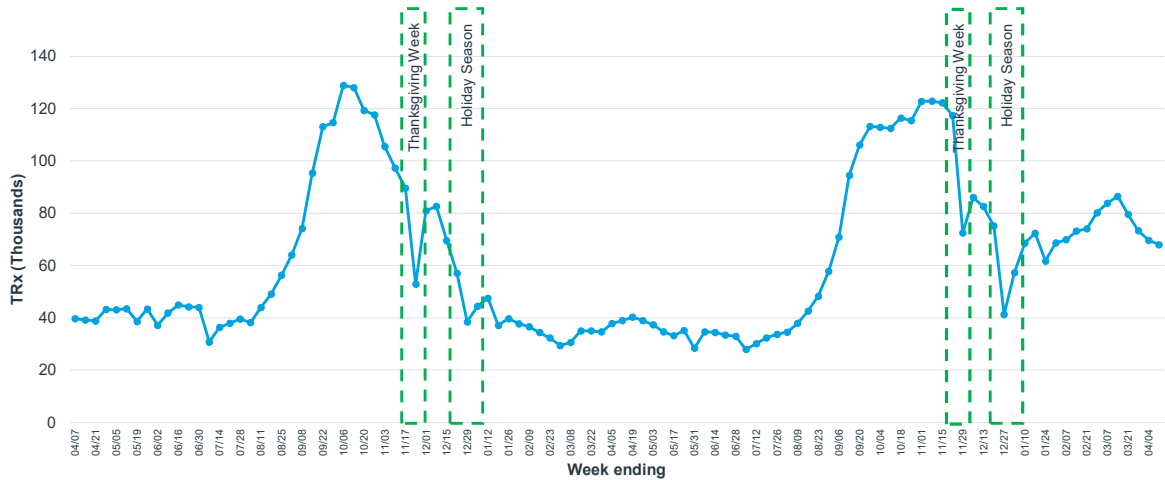
Sources: Rx Weekly NPA data from the week ending 04/07/2023 till the week ending 04/11/2025



11

Pneumococcal Vaccine Weekly NPA Total Rx Volume

Pneumococcal vaccines improved by ~17% in MAT 2025 vs. MAT 2024



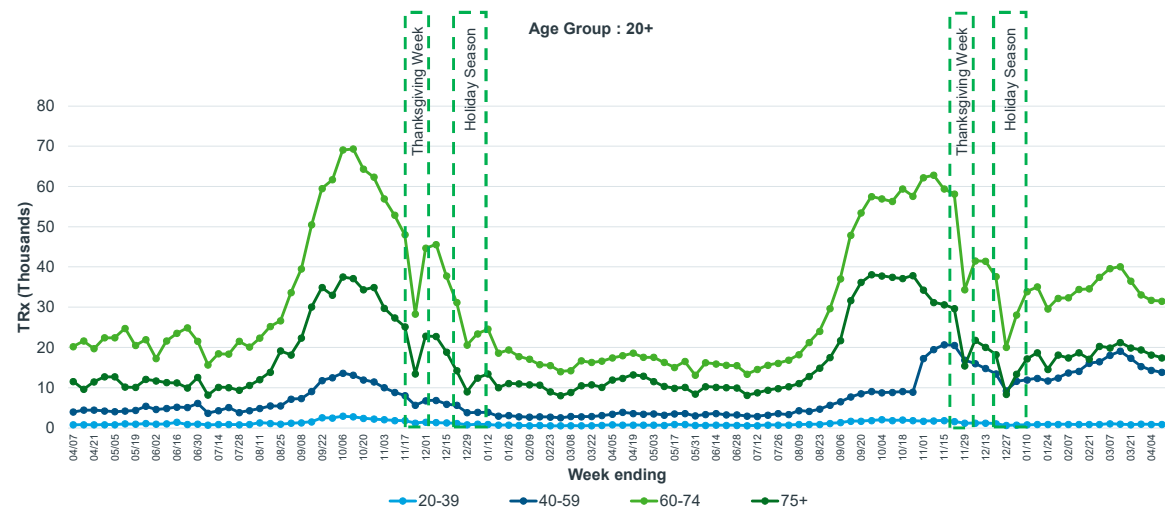
Sources: Rx Weekly NPA data from the week ending 04/07/2023 till the week ending 04/11/2025

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12

Pneumococcal Vaccine Weekly NPA Total Rx Volume – by Age Group

Pneumococcal vaccine administration higher for 60-74 age group within 20+ age group population



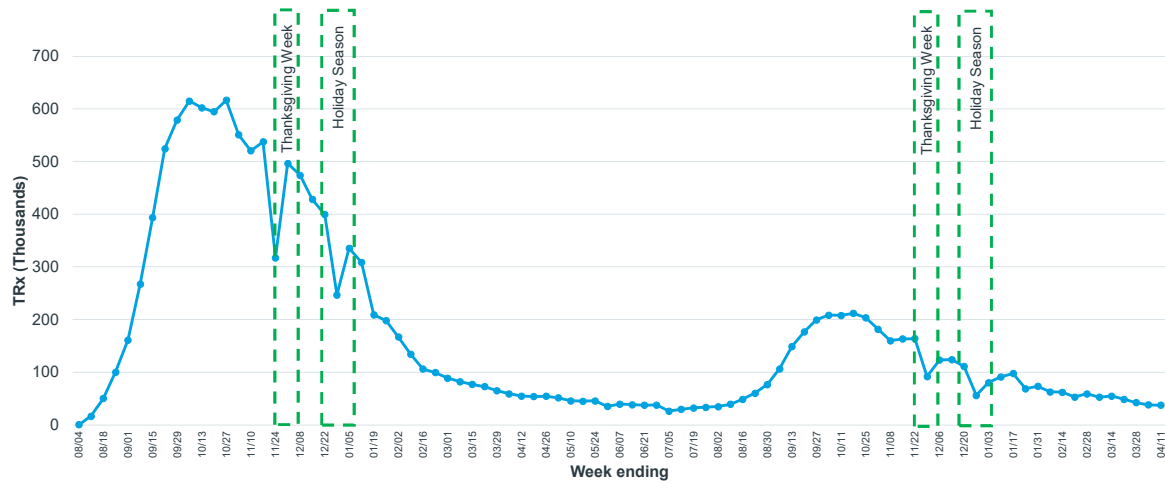
Sources: Rx Weekly NPA data from the week ending 04/07/2023 till the week ending 04/11/2025

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13

RSV Vaccine Weekly NPA Total Rx Volume

RSV vaccines decreased by ~64% in 2025 season vs. 2024 season



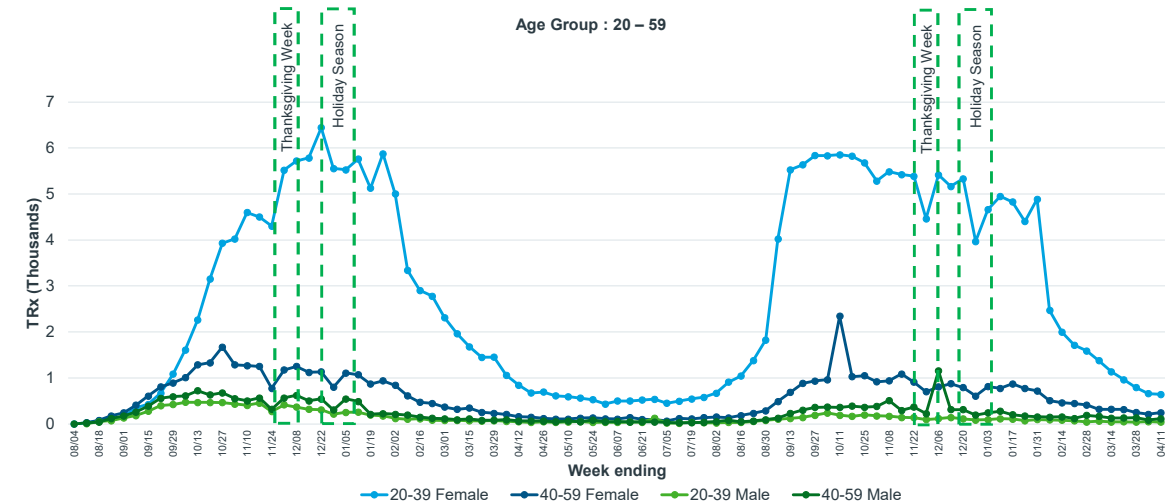
Sources: Rx Weekly NPA data from the week ending 08/04/2023 till the week ending 04/11/2025

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14

RSV Vaccine Weekly NPA Total Rx Volume – by Age Group and Gender

Volume of RSV vaccines highest among 20-39 year old females



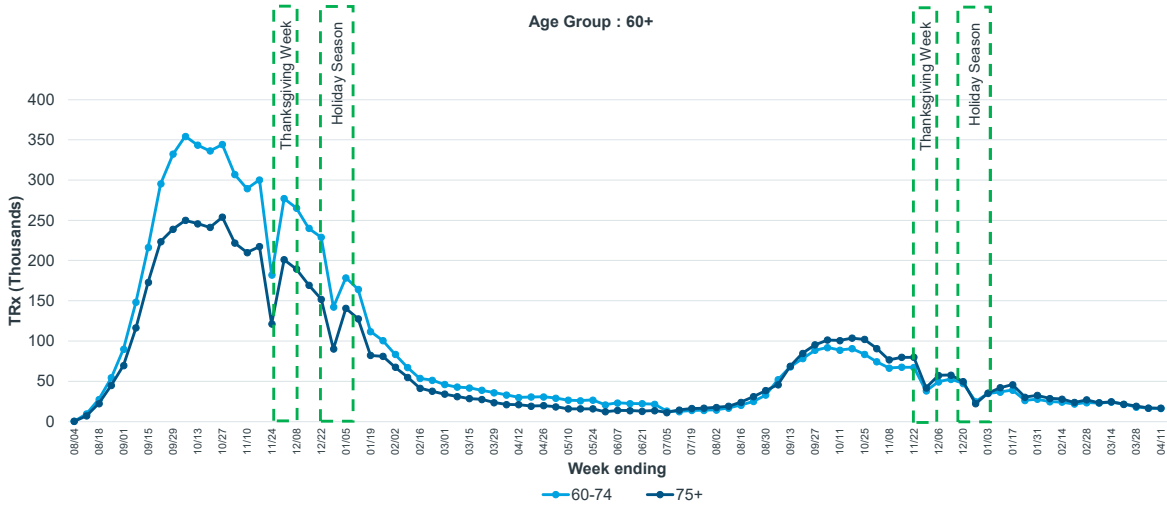
Sources: Rx Weekly NPA data from the week ending 08/04/2023 till the week ending 04/11/2025

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15

RSV Vaccine Weekly NPA Total Rx Volume – by Age Group

RSV Vaccine administration is slightly higher for 75+ in 2025 within the older adult population (60+)



Sources: Rx Weekly NPA data from the week ending 08/04/2023 till the week ending 04/11/2025



16



Thank You!