

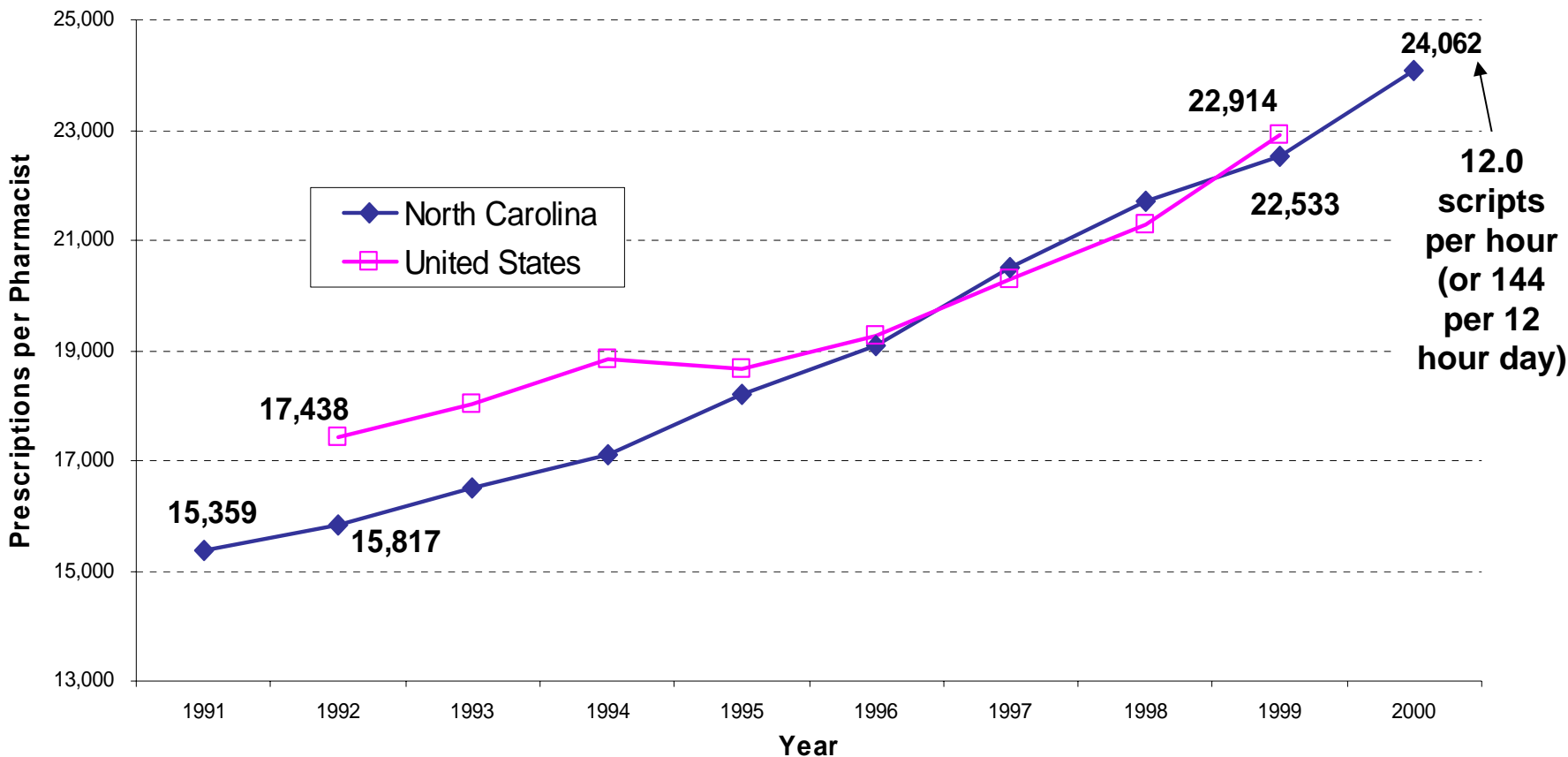
Demand-Side Population Trends

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January 12, 2006

“Demand-Side” Trends

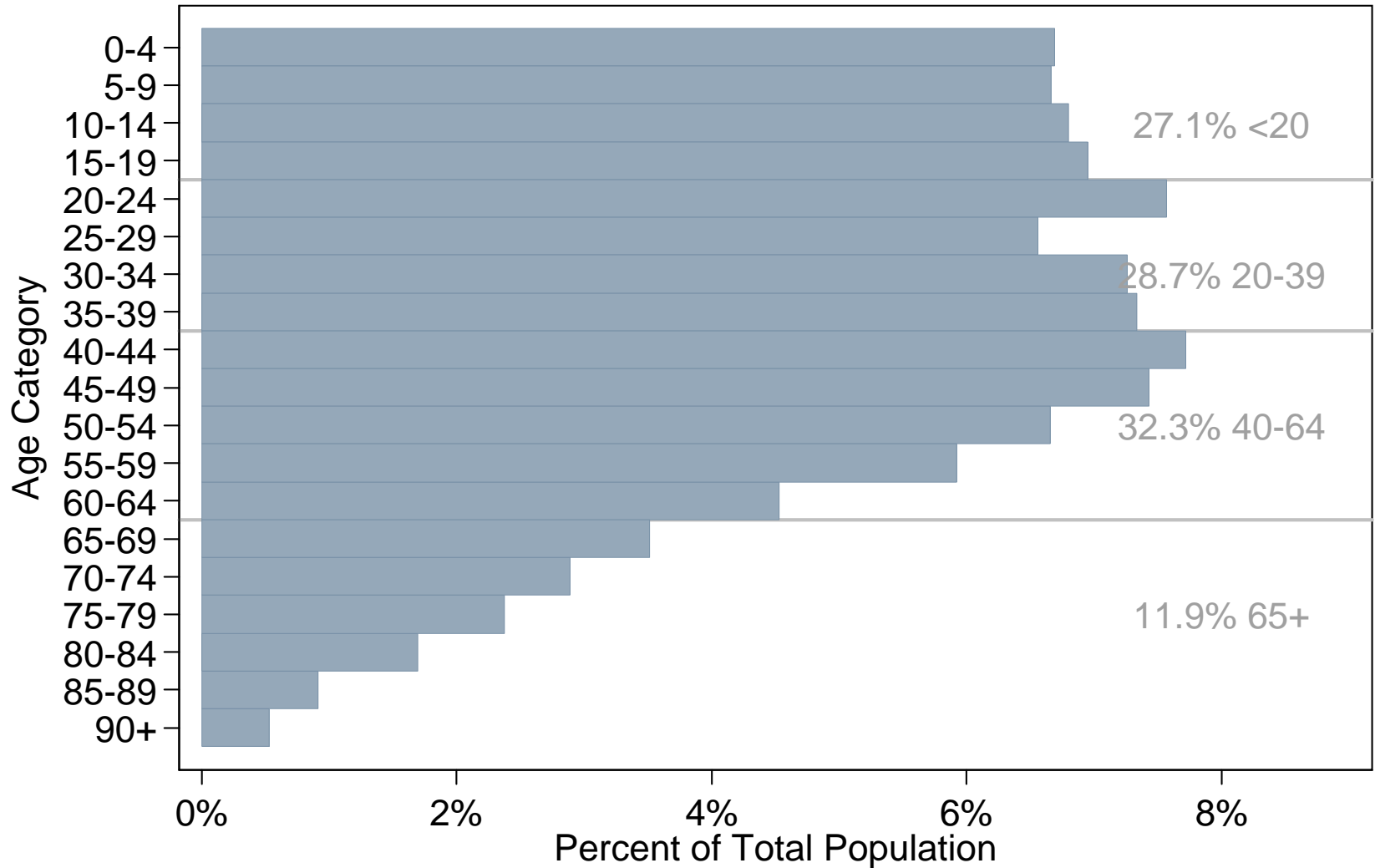
- Most of our focus on supply-side issues
- Demand-side trends exacerbate the need for growth in supply
- Sample of changes in the demand for healthcare
 - Increasing use of prescription drugs
 - Increasing age

Pharmacist Workload: Annual Retail Prescriptions Dispensed Per Retail Pharmacist, US and NC, 1991-2000



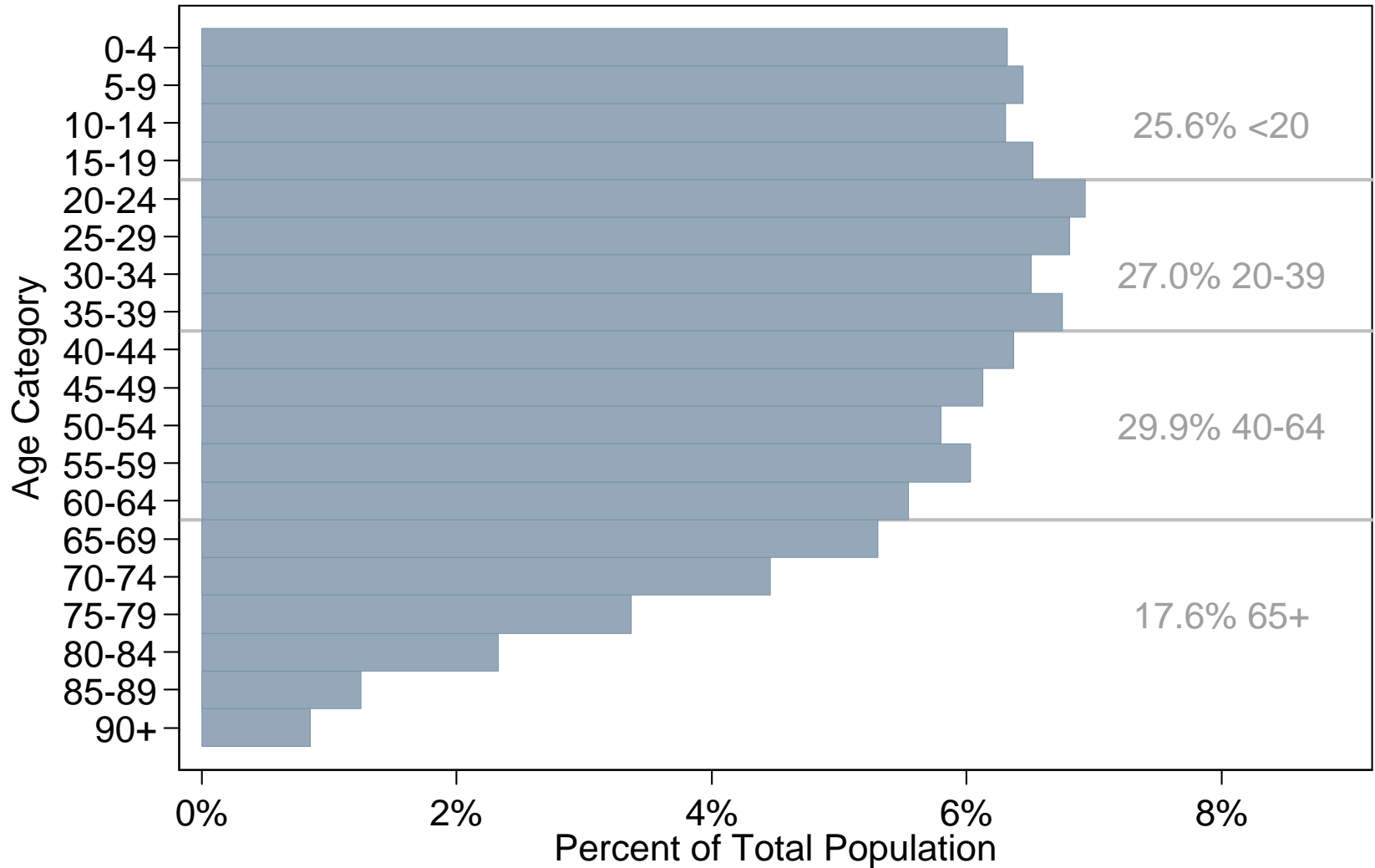
Source: Prescription Data are from IMS Health and include retail dispensed prescriptions only. Data include new prescriptions and refills dispensed. Data does not include prescriptions dispensed at hospitals, clinics, long term care facilities or mail order operations. Pharmacist data are from the North Carolina Health Professions Data and Analysis System and the North Carolina Board of Pharmacy. National data from DHHS Health Resources and Services Administration's The Pharmacist Workforce, December 2000.

2005



Data Source: North Carolina State Demographer

2029

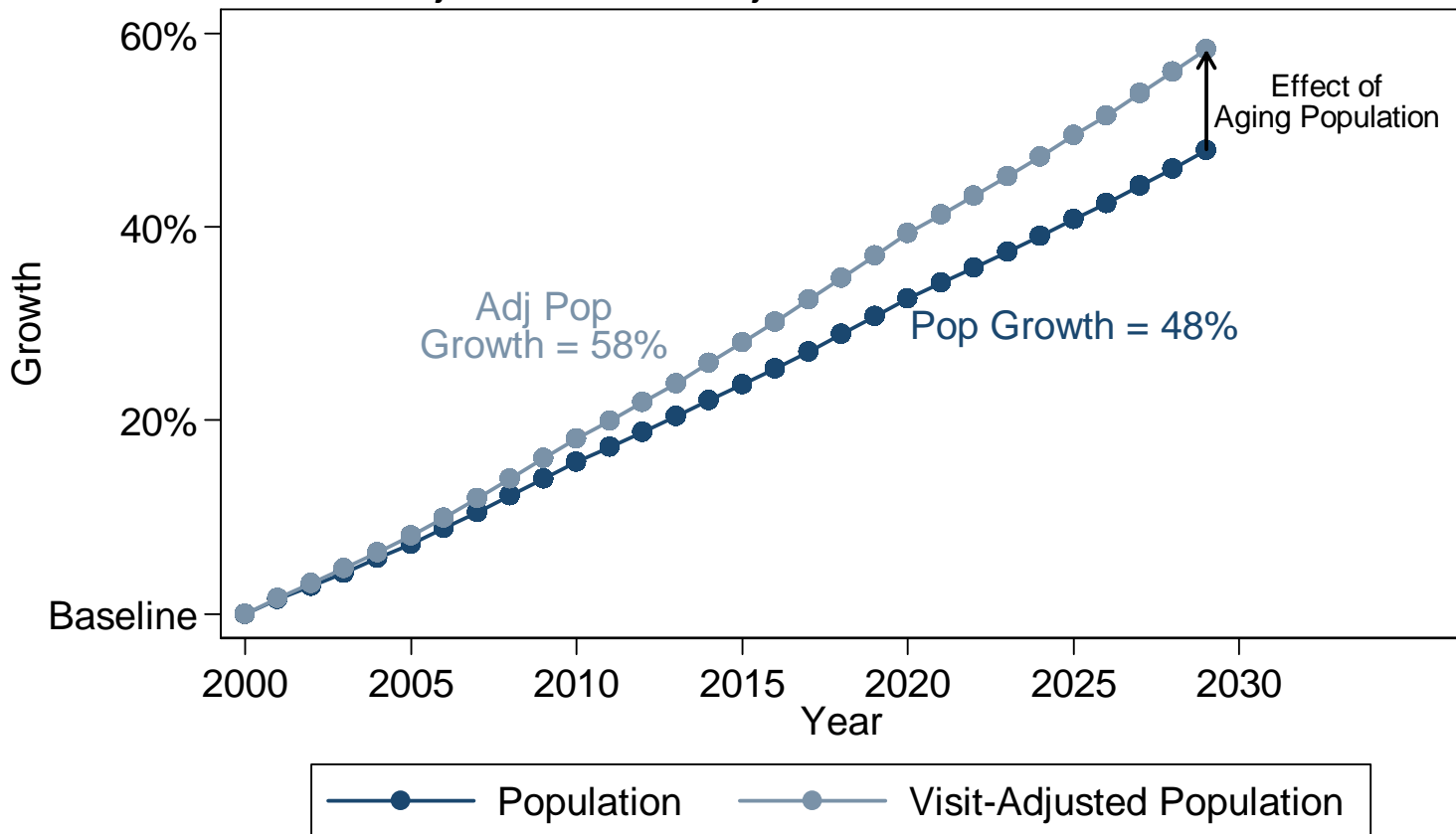


Data Source: North Carolina State Demographer

Percent of population age 65 or older increases from 11.9% to 17.6%.

Growth in North Carolina Population: 2000-2030

Adjusted and Unadjusted for Provider Visit Rate



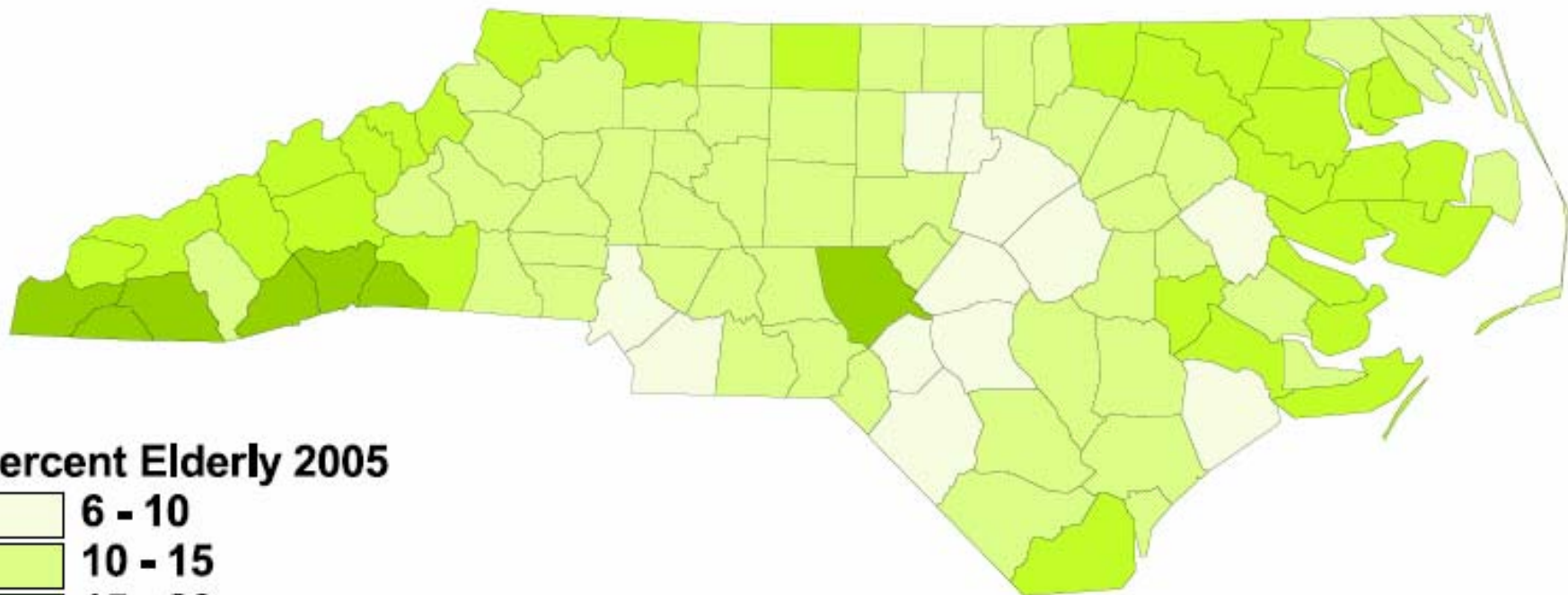
"Adjusted population" accounts for differing office-based provider visit rates by age.
Sources: NC State Demographer (Population), MEPS 2003 (Office-Based Provider Visit Rates)

The shift to an older population will have consequences on the need for healthcare. Using 2003 MEPS data on average office-based provider visit rates by age, the "adjusted population" will increase more than the unadjusted population.

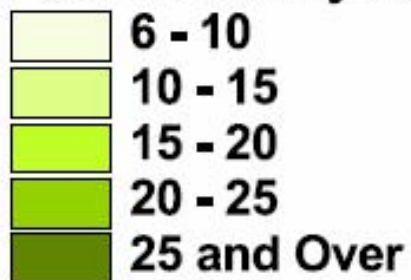
Where will the older populations be concentrated?

- As with many issues we examine, there is substantial local variation underlying the statewide trend

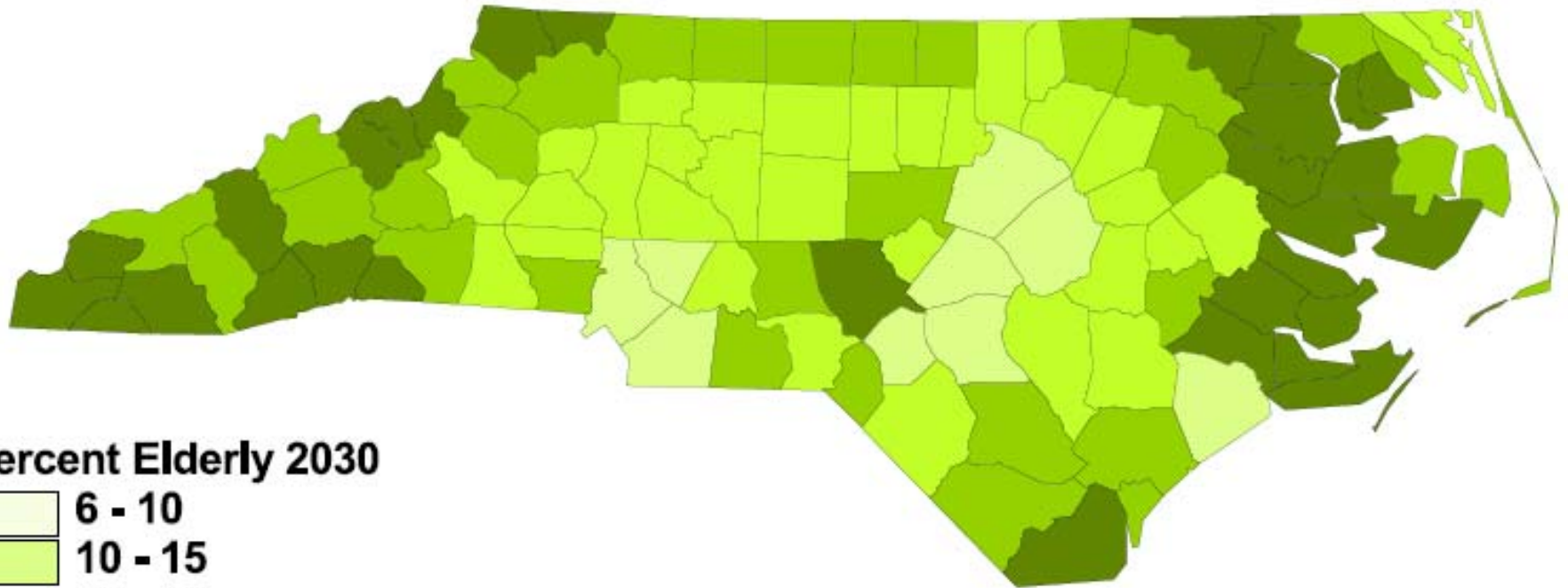
Percent Of County Population Age 65 or Over



Percent Elderly 2005



Percent Of County Population Age 65 or Over



Percent Elderly 2030

