

Sleep Labs in America: An Industry Analysis

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Abstracts

First launched in 1977, there are now an estimated 4,700 “sleep labs or centers” in the United States. These labs perform sleep studies and help design treatment programs for insomniacs and those with sleep apnea and other conditions.

The total overall sleep aids market consists of Rx and OTC medications, premium mattresses, high tech pillows, CPAP devices, white noise machines, smartphone apps, and more. All of this has become a \$28.6 billion a year industry. Sleep labs account for \$4.3 billion of this total.

A total of 58% of Americans are estimated to experience insomnia symptoms or sleep disorders. As obesity rates climb, Americans age, and stress increases, more people are developing sleep apnea, restless leg syndrome and other sleep disorders. Most of those with sleep apnea are undiagnosed, providing ample growth for tests by sleep labs. Some consolidation has taken place, but patient volumes are increasing.

The study includes: market size estimates for 1995-2017, with 2018 and 2023 Forecasts, an Overview of the total sleep market (status reports for the mattress and pillows market, sleep medications, CPAP devices and retail sleep aids), sleep lab chain competitor profiles, a discussions of market nature & structure, history and evolution, reimbursement issues and the effect of Medicare rulings regarding home testing, and staff salaries. The report also includes key sleep lab metrics such as patient volumes, bed counts, pricing, disorders treated, insurance, average revenues, patient profiles, and more.

Company profiles for: SleepMed, Sleep Holdings, Foundation Surgery Associates, Novasom, and Nocturna.

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Glossary of sleep disorder terms

List of major private & public sector information source used

EXECUTIVE OVERVIEW OF MAJOR FINDINGS

Market definition and scope: mkt. segments included

Scope of sleep deprivation in America: prevalence rates of insomnia, causes, no. of sleep disorders, description of most common sleep disorders, NSF vs. other polls.

Nature of the field of sleep medicine and somnology: history/evolution of sleep labs, number, multiple-site chains, mkt. size 1997-2023 F

Why drug companies play a major role in publicizing sleep disorders and creating demand for Rx sleeping pills, mkt. size 1997-2023 F

Size and nature of the mattress & pillows market, new technologies, mkt size

Obstructive sleep apnea market: why CPAP device potential is huge and largely untapped, mkt. size 1997-2023 F

Major Market Trends: discussion of... sleep lab reimbursement and consolidation, home test market, decline of Rx sleep medications mkt. due to generics, growth of OTC meds, mattress mkt. technology and distribution disruptions.

Market Size & Growth, Market Segments: Total mkt. value, effect of recessions, 2007 performance, 2018 & 2023 forecasts

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Table: Mattresses market: 1995-2023 F

Table: Pillows market: 1995-2023 F

Table: Sleep Labs/centers: 1995-2023 F

Table: Rx and OTC sleeping medications market: 1995-2023 F

Table: CPAP devices market: 1995-2023 F

THE SLEEP LABS INDUSTRY

Summary: Industry Nature & Structure

What are sleep labs, how many?, evolution & nature of the field, polysomnograms test description, accredited vs. non-accredited centers

Launching a new sleep lab – the process/key considerations, capital needed, choices for hospital or MD affiliations

The effect of Medicare approval of home tests: discussion, type of devices
What patients can expect at a sleep lab: type tests (PSGs, split night studies, MSLTs, CPAP titrations), role of sleep techs, follow-up

How to find A sleep lab

Industry Size & Growth Outlook, Forecasts

1995-2016 Estimates, 2018 Forecast, reasons for closures/consolidation, reimbursement issues, major problems labs face, long-term outlook.

2014-2018 quarterly surveys of sleep lab metrics: patient volume, bed count (Needham & Co.)

Table:

Table: Sleep Labs revenues, no. of labs, annual % change: 1995-2023 F

Table: National projected sleep study volumes to 2024

Sleep Lab Technicians Salary Trends

Descriptions of the major staff positions, training required (sleep tech, technologists)

Findings of Sleep Review Magazine's salary survey, average salary and ranges for: RPSGTs, sleep techs, respiratory therapists, sleep physicians, sleep center directors, supervisors, managers: by tenure, by day/night shift, by age (2015 vs. 2007)

Table: Salary by job title, by region: - 6 staff positions.

Sleep Lab Operating Metrics:

Results of Past Marketdata U.S. Sleep Labs Survey

Type of sleep lab (percent of total: hospital-based, practice-based, university-based, independent/free-standing)

Average number of PSGs (sleep studies, CPAP titrations and MSLTs) performed in 2006, 2007

Average number of beds operated and average days/nights per week operated

Number of patients the sleep lab would be able to test/titrate per week if operating at 100% occupancy, 7 days/nights per week (average)

List of Sleep centers' biggest issues or problems

Expected effect of March 14 decision by CMS to provide Medicare reimbursement for home sleep studies using portable devices to have on their lab's future

Average fees a sleep lab charges for: PSG sleep study, CPAP titration study, MSLT

Reimbursement – avg. amount a sleep lab receives for: PSG sleep study, CPAP titration study, MSLT

Percentage of a sleep lab's total sleep diagnostic revenue that comes from: commercial insurance, Medicare/Medicaid, patients

Average sleep lab's diagnostic revenues in 2007

Whether sleep labs have an affiliated company that provides PAP set-ups for their patients and generates sleep therapy revenues, number of PAP set-ups performed in: 2006, 2007

Whether economic recessions affect a sleep lab's business?

Percentage of a sleep lab's patient base that is male vs. female

Age of a sleep lab's most typical patient (% by age class)

The contributing factors to a sleep lab patients' sleep disorders (% by type: obesity, large neck size, nasal/airway obstructions, etc.)

Percentage of sleep labs that treat these disorders: sleep apnea, insomnia, restless leg syndrome, narcolepsy, periodic limb movement

Whether sleep labs collect outcome data

Competitor Profiles – The Major Sleep Lab Chains

(description and history of company, no. of labs operated, address, specialties, acquisitions, services, financials when available)

SleepMed, Inc.

Sleep Holdings

Foundation Surgery Affiliates, LLC

Novasom

Nocturna Sleep Center

REFERENCE DIRECTORY OF SLEEP-RELATED TRADE GROUPS, EXPERTS, JOURNALS

List of sleep market national/regional trade associations, journals, consulting firms, brokerage analysts, other key contacts – address & phones, description of activities.

Profiles of Michael J. Breus, Ph.D. and Duane M. Johnson, Ph.D.

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