

U.S. Pain Management Products & Services: A Market Analysis

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Abstracts

This has grown into a \$19.6 billion niche healthcare market, but the field is in turmoil. More than 9,000 programs and sole practitioners (clinics, anesthesiologists, other MDs, chiropractors) treat an estimated 17 million Americans suffering from: chronic pain (back pain, migraines, cancer, arthritis, carpal tunnel syndrome, etc.). An estimated 40-60 million Americans suffer from chronic (long-term) pain. 700+ "pill mills" have emerged to serve Oxycontin addicts and profiteers, as 12 states have no drug monitoring systems in place. The field is moving toward the use of more "procedures" and injections, and 78% of the patient caseload is handled by anesthesiologists, more of whom have moved into pain therapy.

This newly updated Marketdata study is based on proprietary mail surveys and phone interviews and covers: 1985-2014 Forecast \$ market size, market structure, market segments, treatment methods, number of patients/annual caseloads, average program costs/length, marketing methods, insurance reimbursement, and more. Contains proprietary findings of Marketdata custom mail surveys of pain programs and anesthesiologists (separate operating data for multidisciplinary programs vs. anesthesiologists). New chapter covers the pain management devices market (TENS machines, spinal cord stimulators, pumps, etc.). Also covers patient demographics, extensive status report on the pain drugs market, status of the chiropractic profession, and a directory of 100 CARF-accredited clinics. Profiles of John Hopkins, Cleveland Clinic, Mayo Clinic, Univ. of Miami, Scripps, other top programs.

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INTRODUCTION: STUDY SCOPE, OBJECTIVES, SOURCES USED

How information was obtained, list of sources used, sample cover letter and questionnaire used for mail survey, forecasting methodology

EXECUTIVE OVERVIEW OF MAJOR FINDINGS (\$300)

Summary/highlights of all report chapters: definition of chronic pain, prevalence among Americans, characteristics of the field, status of pain management in 2010 vs. 2003-key trends of past 7 yrs., most important issues & mkt. developments, patient demographics, market structure & types of providers (no. of clinics, programs, anesthesiologists, devices, drugs), outlook for the field by pain clinic directors, insurance, reimbursement, painkiller drug abuse and pill mills, typical caseloads, cost of treatment, existing/emerging new treatment methods, \$ market size & growth estimates (1985-2014F), 2009 mkt. performance, 2010 outlook, 2014 4-year projections, Pain Management Devices Market

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NATURE & STRUCTURE OF THE FIELD (\$200)

National cost of lost workdays, drugs, due to pain

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Accreditation & Industry Standards

CARF (Commission on Accreditation of Rehab. Facilities)—its mission, criteria for accreditation, what accreditation means, categories of pain programs

IASP (Intl. Assn. for the Study of Pain) trade group, definitions for: pain facilities, multidisciplinary centers, modality-oriented clinics, etc., desirable characteristics of pain clinics/operating guidelines

American Academy of Pain Management: types of members, accreditation & certification requirements, types of programs 2010 directory of 101 CARF-accredited multidisciplinary pain clinics/programs in the U.S. (hospital, university, freestanding), by state (name/address/phone), by inpatient/outpatient category.

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SUFFER FROM? (\$200)

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Findings of 2000 Merck study “Pain in America” study of pain sufferers: use of drugs/other therapies, referrals by MDs, effectiveness of medical profession, actions taken, time to get pain under control, etc.

Findings of Prevention Magazine/CBS News poll, Jan. 2003 study (type/severity of pain, relief, use of drugs, alternative therapies used, etc.)

Analysis of number of Americans with pain-related conditions—scope of the affected population (why some estimates are inaccurate): back pain, arthritis, RSIs, migraines, TMJ, etc., opinions of accuracy of figures from pain associations/societies

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Findings of 2010 Interviews with Leading Pain Program Directors: Status of pain

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MARKET SIZE, GROWTH RATES, FORECASTS & OUTLOOK (\$150)

Discussion/analysis of total no. of pain programs, clinics, solo practitioners in 2010 vs.

2003, annual patient caseload: estimates for CARF accredited, JCAHO accredited, American Academy of Pain Mgmt. accredited, non-accredited programs, anesthesiologists, other MDs, chiropractors, discussion of inpatients/outpatients mix, overlap between types of programs

Market developments and growth indicators: 2003-2010: discussion

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THE PAIN DRUGS MARKET (\$350)

Status report of the U.S. pain management pharmaceuticals market

Summary of origins of chronic pain, concerns over opioids painkiller addiction and abuse, discussion of Oxycontin & hydrocodone history and usage, patents, producers, FDA actions

Actions to regulate opioids by FDA, REMS (risk evaluation and mitigation strategy), list of Brand name and generic products required to have REMS

Discussion of new drugs in development, COX-2 inhibitors, Tanezumab, Neurotonin, Alternative use of Cymbalta, Lyrica

Transdermal patches: discussion of, size of mkt.

Descriptions of available pain drugs: prescription/non-pres. drugs used for pain relief anti-seizure drugs, Cox-2 inhibitors, NSAIDS, analgesics, opioids, etc.

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The DEA's position on enforcement, actions taken against physicians
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PDMPs The Solution? (prescription drug monitoring programs): Discussion of how These state systems track painkiller abuse, which states have a PDMP/which don't

THE PAIN MANAGEMENT DEVICES MARKET (\$150)

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List of medical device trade associations

Directory of major pain management device producers (name, address, phones)

PROFILES OF SOME LEADING PAIN PROGRAMS (\$200)

(In-depth descriptions of how programs work, outpatient vs. inpatient programs, costs, estimated caseloads, services offered, type specialists, 2009 performance)

The Cleveland Clinic Foundation

The Mayo Clinic

Mensana Clinic (defunct)

Norman Marcus Pain Institute

Scripps Memorial Hospital

University of Washington Medical Center

Pain Control & Rehabilitation Inst. of Georgia

The Rosomoff Comprehensive Pain & Rehabilitation Center

Johns Hopkins Blaustein Pain Treatment Center

STATUS REPORT OF THE CHIROPRACTIC SERVICES INDUSTRY (\$150)

Discussion of the profession, competition with pain programs for same clients, federal low back pain guidelines, industry receipts (1985-2001)

Patient demographics--survey results, patients by: sex, age, race, occupation

Controversial new research/study by the Annals of Internal Medicine, other recent studies

ACA Statistical Study results: avg. number patient-visits per doctor per week, no. of new patients, referrals, gross & net income, historical new patients & patient visits (1984-1996), type conditions patients treated for (1995, '97, '89), age of patients, sources of chiropractor revenue by type insurance

Future trends the major issues likely to affect the profession, current state legislative actions, diagnostic testing, outcome assessment, etc.

REFERENCE DIRECTORY OF CHRONIC PAIN AND RELATED ASSOCIATIONS, SOCIETIES, GROUPS, INSTITUTES 238-246

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