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Who performs Pap tests?, public vs. private sector (Planned Parenthood tests 1986-2007)

Discussion: Can existing professionals handle the work volume? No. of cytology training programs, rebound since 1988, salaries/vacancy rate of cytotechs, daily workload limits, recent reforms, discussion of past error rates, poor work/screening practices

The Workplace Drug Testing Market ($300) 78-109

Estimated cost of drug abuse in the U.S. workplace, societal costs

Size/growth rate of testing, no. of tests done, scope of drug testing in U.S. today, estimated no. of workers tested, transportation workers (NIDA, trade journals opinions, AMA)

Types of drug tests used (urine, blood, hair), shift to hair and saliva analysis - discussion of new emerging tests, changes in Federal testing planned (SAMHSA)

Trends in drug use: latest 2008 findings of Quest Drug Testing Index (1988-2008), decline in amphetamine usage, test positive rate trends

Table: annual positivity rates for U.S. workforce: 1988-2008


Market size: Marketdata estimates of drug test mkt. $ value/growth for 1989-2009, demand, outlook to 2013 F-negative effects of a recession and hiring on mkt., reasons for flat growth, major competitors involved, avg. test costs

Table: Estd. Revenues of the top 5 drug testing companies: 2004-2008

The home drug test market. Nature of, Mkt. size estimates, Phamatech, First Check

Testing by the insurance industry: Discussion of Lab One, Clinical Reference Labs, Osborn Labs - estimated shares of market, mkt. size in $

Major findings of AMA Drug Testing Survey (2004 is latest): prevalence of testing, by corporations, testing of current employees, new hires, test-positive rates, employer actions, avg. cost per employee, effectiveness, testing methods used, etc.

2004 AMA survey results: workplace medical testing, 1997-2003 trends: tables for... testing rates by companies for new hires/current workers, reasons for drug testing, historical dat

The private sector - worker privacy issues, court rulings, random testing, state policies

The public sector - DOT/transportation worker testing (regulated industries): labs qualified by SAMHSA, certification requirements

List: Name, address, phone no. of the 48 labs certified by NIDA for federal testing.

Competitor Profiles (in-depth descriptions, estd. and actual drug test revenues, etc.) for: Quest Diagnostics, Lab Corp. of America (and LabOne), Medtox Scientific. (2008 revenues)

The Esoteric Test Market ($400) 110-135

Discussion of what defines esoteric vs. routine tests, no. of labs performing, major trends emerging, discussion of Medicare reimbursement

Coverage of latest mkt. developments, constraints & positives for growth

Competitor & brokerage analyst estimates of esoteric vs. routine, other test segments


Ranking of top companies in the market: 2006 vs. 2009 (Marketdata estimates or actual sales), The 7 main classes of esoteric tests (oncology, immunology, toxicology, genetics, hematology, etc.)
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* Industry receipts, by: routine, anatomic pathology, esoteric: 1999-2013F ($ and % of total)
* Esoteric tests, by kind: $ receipts 2003, 2005, 2009 (endocrinology, genetics, immunology, infectious disease, oncology, serology, toxicology)

Competitor Profiles

(address, capabilities, specialties, no. of tests performed, revenues-when available) for: ARUP, American Esoteric Labs/Sonic Healthcare, Bio-Reference Labs, Clinical Pathology Labs, Genzyme, LabCorp of America (Esoterix, Dianon, Viroed, Dynacare), Mayo Medical Labs, Medtox Scientific, Quest Diagnostics (AML, Ameripath, Unilab, LabOne) – 2004-2009 revenues.

Physician-Office Labs ($150)

* Discussion of estimated number in U.S., growth/decline, regulations that have cut their share of industry revenues, estd. current share of industry receipts in 2009 effects of CLIA on group practices, historical investigations about overuse of lab tests, conflicts of interest, debates, etc. Brokerage firm estimates.

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- No. of POLs, by lab type (2009 CMS data)
- POLs, by CLIA certification type (2006)
- No. of labs, by type/location of facility (2009 CMS data)
- No. of all labs and POLs, CLIA registered: 1993-2009
- POLs, by application type: 1995-2005
- Annual receipts and avg. receipts per POL: 1999-2006, projected 2007-2013

Structure & Operating Ratios Of The Commercial Lab Industry ($300)

* Summary and discussion of key findings: no. of US labs, 1982-2007 20-year industry ratios summary, single vs. multi-unit operations, legal form of organization, ratios by receipts size of company & establishment (lab), top 50 firm’s mkt. share levels, geographic analysis/receipts by state (1997 vs. 2002 Census data), financial health/composite industry balance sheet ratios
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* Non-employer stats. For 2002, receipts, by legal form of company
* Medical labs, by legal form of organization: 2002, 1997 & 1992 (corporation, individual proprietorship, partnership, etc.)
* Medical labs, by annual receipts size of FIRMS: 2002, 1997 & 1992, (no. of firms, labs, receipts, as % total industry)
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* Labs’ ratios (as above) by single vs. multi-unit operations: 2002, 1997 & 1992
* No. of medical labs, by state: 1997 vs. 2002 vs. 2007
* No. and receipts of labs, avg. receipts per lab, by state: 1997 vs. 2002
* No. & receipts of non-employer labs, by state: 2007
* Composite financial statement for medical labs as a group- average balance sheet & income statement/key ratios: 2005-2009

Lab Staff Issues: Salaries, Vacancy Rates, Turnover ($250) 180-197

* Results of 2008 ASCP/Lab Medicine Magazine Survey:
  - Discussion of hourly wages and % increases in beginning/avg. pay scales: medical technologists, cytotechs, histologic techs, ML techs, phlebotomists, national data:2000-2005 comparisons.
* ASCP 2008 Wage & Vacancy survey, major findings
* Medical Technologists & Medical Technicians employment & mean income (2000-2008)
  - A T able: Avg. hourly wages, by 12 lab staff positions: 2003, 2005
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* Summary of ASCT salary survey, 2008, cytotech vs. other positions, yearly salaries
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  - S table: No. of cytotech vacancies per lab
  - S table: No. of years in the field, in current position, in current lab.

Medical Lab Observer Magazine 2003-2009 survey highlights:
* Summary & discussion of, tables for:
  - Annual salary, medians: 2003-2009, by 7 job types, staff & supervisory
  - Annual salary, medians: 2003-2009, by region
  - Annual salary, medians: 2003-2009, by years in the field
* Discussion of medical lab staff training programs

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  - No. of accredited cytotechnology programs: 1976-2000
  - Grads from accredited programs: 2001-2004, annual increase in workforce
  - Projected yearly increase in medical lab techs 2005 to 2014
Company Profiles - The Top Industry Competitors  ($300)  198-222

(For most companies below: historical development of firm, kinds of tests performed, 2006-2009 financial performance, 2010 guidance, divisional breakdowns and structure, recent mergers, acquisitions or joint ventures, marketing agreements, company strategies, etc.)

* AmeriPath (Quest)
* Associated Regional & University Pathologists
* Bio-Reference labs
* Clinical Pathology Labs (Sonic Healthcare)
* Laboratory Corp. of America Holdings
* Mayo Medical Laboratories
* Quest Diagnostics
* Spectrum Laboratory Network
* Sonora Quest Laboratories

Reference Directory Of Industry Information Sources  223-231

(Lab industry trade associations, trade journals, consulting firms, government agencies, special reports and surveys, stock analysts, etc.), address, phone, key contacts