

# **The Market For Retail Health Clinics & Urgent Care Centers**

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### Tables:

- Family Practice, Ranked by Longest Average Wait Time to Shortest Average Wait Time: 2009
- Emergency Department Visits in the United States, 1997-2007, by Demographic Characteristics and Insurance Status
- Ten Leading Principal Reasons For Emergency Department Visits, By Patient Age and Sex: United States 2009 – Under Age 15
- Ten Leading Principal Reasons For Emergency Department Visits, By Patient Age and Sex: United States 2009 – Age 15-64
- Ten Leading Principal Reasons For Emergency Department Visits, By Patient Age and Sex: United States 2009 – Age 65+
- Active Primary Care Physicians per 100,000 Population; 2010
- States & Cities With Above-Average Potential For More Retail Clinics

## **Nature of the Retail Health Clinics Market (\$100)**

44-52

- Consumer demand for “convenient care”
- Investment potential, interest by private equity firms
- Operations: size of typical clinics, start-up costs, staffing, hours, seasonality
- Cost/fee comparisons to emergency room visits
- Licensure & Regulation

## **Retail Health Clinic Operations (\$100)**

53-60

- Summary and discussion: number of clinics, caseloads, size, fees, insurance coverage
- Technology trends: linkage/communications with other health care providers
- Geographic distribution of clinics: by state, urban areas, type of retail site
- Ownership of clinics: retail chains, physician groups, hospital chains
- Share of the population with quick access to a clinic: discussion

### Table:

- State populations per retail clinic: 2008

## **Retail Clinics Market Size & Growth, Forecasts (\$150)**

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- Discussion of sources of data, limitations: number of clinics nationwide, growth
- Findings of Deloitte 2008 study: number of patient visits: 2007 vs. 2009
- Technology trends identified by the American Telemedicine Association
- Number of U.S. retail health clinics: 2006 to 2016 forecast, Marketdata estimates
- Market size estimates and methods/rationale: 2011, 2009, 2010, 2007
- **2012 & 2013 Forecast**
- **2016 Forecast:** factors affecting growth over next 4 years, potential effect of the Patient Protection and Affordable Care Act

### Tables:

Estimated \$ size of the retail convenient clinics market: 2007 to 2016F

## **The Major Retail Clinic Competitors (\$200)**

72-88

(company address, description, history, number of sites, services provided, recent developments, mergers, etc.)

### Profiles For:

- **MinuteClinic (CVS)**
- **TakeCare (Walgreens)**
- **Walmart Clinics**
- **Target Clinics**
- **The Little Clinic (Kroger)**
- **Rite-Aid**
- **Safeway**
- **RediClinic**
- **FastCare**
- **Aurora QuickCare**

## **Nature of the Urgent Care Centers Market (\$100)**

89-96

- Market nature and definition, number of centers (Urgent Care Assn., NAFAC)
- Scope of services provided
- Staffing and facility design, size, start-up costs
- Discussion of number of centers: estimates by Urgent Care Assn., Merchant Medicine, Rand Corp., rationale for estimates/past surveys

### Tables:

- Number of urgent care centers in the U.S.: 2000-2016, Marketdata estimates
- Number of urgent care centers, by state and region (Merchant Medicine estimates)

## **Urgent Care Center Operating Ratios and Profitability (\$100)**

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- Results of 2010 Urgent Care Assn. Benchmarking Study: 2008-2010 growth, ownership, patient visits per week, patient wait times, payment methods, years in operation, types of providers
- Profitability: sample income and expense statement for a typical urgent care center: Marketdata estimate based on Doctor's Express UFOC 2011 document, % of revenues
- Trends in access to care: discussion of Dept. of Health and Human Services data regarding projected 2020 physician access, emergency department trends/crowding
- CDC data regarding number of emergency department visits, cost of urgent care visits, capacity, future roles of urgent care centers.

## **Urgent Care Market Size & Growth Forecasts (\$150)**

104-111

- Discussion of number of urgent care centers and various estimates
- **2007 market size:** Marketdata estimates, based on average number of patient visits, fees, new vs. mature centers mix
- **2009 market size:** Marketdata estimates, based on average number of patient visits, fees, new vs. mature centers mix
- **2011 market size:** Marketdata estimates, based on average number of patient visits, fees, new vs. mature centers mix
- **2012 market size:** Marketdata estimates, based on average number of patient visits, fees, new vs. mature centers mix
- **2013 to 2106 Forecast:** projections based on passage of Affordable Care Act, growth in caseloads and number of centers, other factors

### Tables:

- Number of urgent care centers: 2000-2016, Marketdata estimates
- Estimated national revenues of U.S. urgent care centers: 2000- 2016F

## **The Major Urgent Care Competitors (\$200)**

112-127

(company address, description, history, number of sites, services provided, recent developments, mergers, etc.)

Summary & discussion

### Tables:

- Number of urgent care centers: 2000-2012
- The major urgent care chains (number of centers, region and state)
- Major urgent care center chains, by estimated 2011 revenues
- The major hospital urgent care operators (number of centers)

### Profiles For:

- **Concentra**
- **US Healthworks**
- **MedExpress**
- **Nextcare**
- **Doctors Care**
- **Doctors Express** (Includes gross revenues and expenses by type for 2011, estimated initial investment for a franchise, gross sales/patients/patient visits per day/average revenues per patient visit for 16 centers in select cities)
- **FastMed**

**Reference Directory of Industry Information Sources**

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Name/address/phone/key contacts: trade groups, journals, magazines, directories, special surveys, consultants, etc.