

# **The U.S. Autism Treatment Centers Market**

September 2022 - Marketdata LLC

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Highlights of all report chapters: Nature of the market and its characteristics, key market metrics, patient demographics and demand, market structure and competition, description of ABA programs, market size and growth (2009-2019, 2020 – effects of the pandemic, 2021 performance, 2022 & 2025 outlook & forecasts), the role of private equity investors.

### Tables

- The Major For-profit Autism Treatment Center Chains: 2021 (no. of centers)
- Number of Autistic Children in the U.S. by Type: 2020
- Estimated Size of the U.S. Autism Treatment Market: 2009-2025 Forecast

<b><u>Nature of The Field &amp; Patient Demographics</u></b>	20-33
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Summary: Definition of Autism Spectrum Disorder, typical symptoms, incidence  
In the population

Types of treatments used

Non-profit vs. for-profit treatment centers

Patient demographics: Latest CDC data on incidence of autism, increase

Increase in disease population set to boost the future market

Extensive list of facts about autism and the scope of the disorder, by the Autism Society, CDC,

NIH, Autism Speaks (economic costs, risk factors and characteristics, etc.)

### Tables

- No. of children with autism by: gender, race, living in a metro area

- Number of 3-21 Year-Olds With Autism Served Under The Individuals with Disabilities Education Act (IDEA) in the United States: 2000-2021

## **ABA Treatment Centers & Programs (Applied Behavior Analysis)**

34-46

Summary: Discussion of types of programs: center-based, community, in-home therapy

Key metrics (no. of adults and children with autism, avg. revenues per treatment center, avg. per therapist, percent of patients using medications, percent with access to insurance coverage, estimated market value)

In-depth description of how ABA programs work, types of therapy, controversies

Description of other therapies used (TEAACH, speech therapy, occupational therapy)

Discussion of obstacles with insurance coverage, Medicare, Medicaid, other major market issues, insurance coverage is getting better, states without essential health benefit, share of children covered by insurance now vs. 2016.

BLS job outlook for Applied Behavior Analysts to 2029, average salaries, shortage

Demand for license behavior analysts - annual number of job postings nationwide over the past 12 years (2010–2021)

Salary levels for Applied Behavior Analysts: top paying states, hourly/yearly wages

Insurance coverage is getting better: discussion

The Cost of Care/ABA programs – Varies by need and type, typical no. of hrs. and cost per year

### Chart/Map

- Insurance coverage for autism treatment, by state: 2016

## **Market Size & Growth, Market Segments**

47-65

Summary: Discussion of market size estimation methods, known facts about the autism treatment market, major industry metrics

Discussion of major drivers of the market

### **Analysis of Non-profit and For-profit Autism Treatment Centers & Schools:**

**2020 Market Performance:** Effects of the 2020 pandemic, Marketdata estimates of industry \$ size and growth, revenue performance of 137 non-profit treatment centers in the Guidestar database (New analysis by Marketdata).

**2021 Market Performance:** Recovery from the pandemic, shift to partial virtual operations

**2022 Market Forecast:** Addition of new centers, acquisitions by major for-profit players

**2025 Forecast:** key factors affecting demand, Marketdata estimates of industry \$ size and growth

Rationale for estimating market size:

- by no. of patients in treatment programs
- by revenues of for-profit and non-profit treatment programs/centers, avg. revenues per center

Discussion of available information & proxy indicators

Discussion of insurance coverage

Growth factors

### **Analysis of the Autism Medications Market**

Discussion of reasons for shrinking sales, \$ size of the market

## Tables

- List of top 12 treatment chains (no. of centers, estd. revenues, 2018, 2021)
- Size of the U.S. autism treatment market: 2009-2025 forecast (programs, drugs, total)
- Size of the autism medications market: 2006-2025 F (Risperdal, Ritalin, Concerta)
- Incidence of autism, no. of children with autism vs. population: 2000, 2010, 2016, 2020.

Estimates of market size and growth by other research firms.

## **The Market For Autism Medications**

66-78

Summary & Discussion of the drugs currently used to treat behavioral and emotional problems of autistic children, including mood stabilizers, antipsychotics, stimulants

List of drug companies doing research and clinical trials

**Risperdal:** description and uses, side effects and problems

**Abilify:** description and uses, side effects and problems

**Ritalin:** description and uses, side effects and problems

Market Size: estimates by Marketdata, actual sales by drug companies, emergence of less costly generics as patents expire

New Drugs Under Development (Bumetanide, Balovaptan, Suramin, Lithobid, others)

List of Key Players in the autism drugs market

**2022 forecast:** Marketdata estimate of \$ market size

**2025 Forecast:** Marketdata estimate of \$ market size

## Table

- Estimated sales of autism drugs in the U.S. 2006-2021, 2022 & 2025 Forecasts.

## **Competitor Profiles**

79-102

(Descriptions of program, number of sites/centers and therapists, specialties, headquarters address, estimated/actual revenues, acquisitions)

- Autism Treatment Network (Autism Speaks)
- Autism Learning Partners
- Autism Spectrum Therapies
- Butterfly Effects
- BlueSprig
- Centria Autism Services
- The Center for Autism & Related Disorders (CARD)
- ChanceLight™ Behavioral Health and Education
- City Pro Group
- Easter Seals
- Hi-5 ABA Inc. (franchise)
- Hopebridge
- Kadiant
- LEARN Behavioral
- The May Institute – (incl. 2018-2021 financial profile/income statement)
- Success on the Spectrum (franchise)
- Trumpet Behavioral Health

## **Reference Directory**

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Directory of autism research, treatment and education organizations, societies, Institutes, magazines, reports, special surveys, experts, other information sources