2015 Physician Office Market Report

Description: Market-At-A-Glance

The physician office market continues to add more new initiatives to its list of priorities in order to meet the challenges of both today and the future. Physicians in large numbers are either selling their practices to become hospital employees or are merging with hospitals to form integrated delivery networks (IDNs). Those who remain in practices are juggling the effects of consumerism and the increase in the number of newly-insured, as well as the competition from retail providers.

Key Topics

The market changes listed above are further augmented by the rapid growth of both retail clinics and telehealth. Physicians are faced with increasing options and demands in the area of information technology. A result of these increasingly rapid and diverse changes is the increasing number of physicians who say they are burned out and planning to leave the field or retire. Physicians are facing similar challenges whether in private practice or in community health centers, ambulatory surgery centers or urgent care. A major change in reimbursement for physician office labs is also expected to have major impact by 2017.

Healthcare Policy

How a physician is reimbursed for services under Medicare experienced a major quality-directed overhaul in 2015, with changes to the Sustainable Growth Rate (SGR) legislation. The Physician Quality Reporting System, Value-Based Payment Modifier and Electronic Health Record Meaningful Use will all be consolidated into one Merit-Based Incentive Payment System (MIPS). The new bill will also keep the Children’s Health Insurance Program funded through September of 2017.

GHX Sales Data

The data from the Global Healthcare Exchange (GHX) Market Intelligence program provides statistics on overall growth in physician office sales through distribution, as well as for top product categories by both dollars and units for the prior calendar year. Of the $40.2 billion in overall healthcare sales through distribution as reported by GHX for 2014, the physician office market represented the third largest portion of those sales, after acute care and home healthcare. Physician office sales were more than double that of long term care or treatments centers, and showed a slight increase over 2013 physician office distributed sales reported to GHX. In growth by specialties, oncology far outpaced all others, with a double-digit uptick in sales by both dollars and units.

Contents:

1. Market-At-A-Glance
   - Physicians Dealing with Many Initiatives
   - Primary Care Physician Demand Projected to Increase
   - Physician Specialties Unchanged Despite Changing Market
   - Operating Costs Vary Based on Specialty
   - Other Key Operating Cost Data
   - Larger Practices Are More Likely Affiliated
   - Mergers and Acquisitions Deal Volume Down
   - No Significant Increase in Patient Volume or Acuity Attributed to ACA

2. Key Topics
   - Telehealth Shortens Wait Times, Offers Savings
   - More Than One-Third of Employers Offer Telemedicine Insurance Coverage
   - Patients Support Physician Use of Technology
   - Primary Care Physicians Still Not Maximizing Adoption, Use of Information Technology Tools
   - Electronic Health Record Penalties Begin
   - By 2025, Physician Shortage Projected to Grow by Up to 90,000
   - Nearly Half of Physicians Feel Burned Out
- How Physicians Are Coping with Burnout
- Physician Office Labs Are a $1.5 Billion Market
- Lab Reimbursements Set to Be Overhauled
- Community Health Centers (CHCs) Better Funding, More Staff
- Community Health Center Patients By Source of Insurance, 2010-2019
- Key Challenges for Ambulatory Surgery Centers
- Retail Healthcare Continues to Grow

3. Healthcare Policy
- Medicare Sustainable Growth Rate (SGR) Reform Becomes a Reality
- Medicare Expenses Grow, SGR Funds CHIP
- Quality Measures Consolidation, Overhaul

4. GHX Sales Data
- Physician Market Up 2.66% from 2013 to 2014
- Top Physician Product Categories, 2013 vs 2014 (in Dollars and Units)
- Top 10 Growing Physician Product Categories, 2013 vs 2014 (in Dollars and Units)
- Top 10 Physician Subspecialty Product Categories, 2013 vs 2014 (in Dollars and Units)

Ordering:
Order Online - [http://www.researchandmarkets.com/reports/3379281/](http://www.researchandmarkets.com/reports/3379281/)

Order by Fax - using the form below

Order by Post - print the order form below and send to

    Research and Markets,
    Guinness Centre,
    Taylors Lane,
    Dublin 8,
    Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Product Name: 2015 Physician Office Market Report
Web Address: http://www.researchandmarkets.com/reports/3379281/
Office Code: SCPLROV6

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Product Format</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hard Copy</td>
<td>USD 799 + USD 57 Shipping/Handling</td>
</tr>
<tr>
<td>Electronic (PDF) - Single User</td>
<td>USD 1550</td>
</tr>
</tbody>
</table>

* Shipping/Handling is only charged once per order.

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title: [ ] Mr [ ] Mrs [ ] Dr [ ] Miss [ ] Ms [ ] Prof
First Name: __________________________ Last Name: __________________________
Email Address: * __________________________
Job Title: __________________________
Organisation: __________________________
Address: __________________________
City: __________________________
Postal / Zip Code: __________________________
Country: __________________________
Phone Number: __________________________
Fax Number: __________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:

Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:

<table>
<thead>
<tr>
<th>Account number</th>
<th>833 130 83</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sort code</td>
<td>98-53-30</td>
</tr>
<tr>
<td>Swift code</td>
<td>ULSBIE2D</td>
</tr>
<tr>
<td>IBAN number</td>
<td>IE78ULSB98533083313083</td>
</tr>
<tr>
<td>Bank Address</td>
<td>Ulster Bank, 27-35 Main Street, Blackrock, Co. Dublin, Ireland.</td>
</tr>
</tbody>
</table>

If you have a Marketing Code please enter it below:

Marketing Code: ___________________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:

(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World