

WINTERGREEN RESEARCH, INC.

**Long Term Care and Nursing Home Information Systems
Market Shares, Strategies, and Forecasts, Worldwide,
2010 to 2016**

**Long Term Care and Nursing Home Information Systems -
Provides Access from Anywhere**



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

OPPORTUNITY ABOUNDS

**WinterGreen Research, Inc.
Lexington, Massachusetts**

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Medicare Nursing Home Analysis
Nursing Home Information Systems
Electronic Medical Record (EMR)
Electronic Patient Record
Electronic Healthcare Record
EHR
Pharmacy Systems
LTC
Systems Resident Assessment Instrument (RAI)
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**Long Term Care and Nursing Home
Information Systems Market Shares,
Strategies, and Forecasts, Worldwide,
2010-2016**

LEXINGTON, Massachusetts (July 21, 2010) – WinterGreen Research announces that it has a new study on Long Term Care and Nursing Home Information Systems: Market Strategies, Shares, and Forecasts, Worldwide, 2010-2016. Long term care and nursing home information systems create ways to treat patients in long term care facilities more efficiently. The study has 253 pages and 93 tables and figures.

New long term care information systems have revolutionized the market, creating units that work across the board in long term care situations. This evolution of the software means that clinicians have more flexibility of care decisions, caring for people.

Information systems are emerging as a significant part of the nursing home and long term care delivery systems. All facilities have some kind of automated systems, but this study addresses the industry specific systems that are evolving with industry specific financial management and process integration.

Software leverages the efficiency of clinical process in ways that have never become possible before. The electronic patient record can be integrated with financial systems, increasing the efficiency of transmitting services description to the insurance providers.

The ability to capture services delivery electronically at the point of care is central to creating more efficient infrastructure for the providers. The system leverages virtually all the administrative and financial information needed to run a successful home care company. Information can be gathered right from the charts.

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The significance of integration systems is not yet realized in nursing home information systems. Collaboration and electronic patient records promise to drive the efficiencies gained from electronic records in to the clinical delivery process, giving caretakers more time to spend with patients. As patients move from one care venue to another, the patient record is going to need to move with them. The hand-held, computer-based system guides home care clinicians through the entire patient care process. Clinicians can use structured record guides. The systems automate reporting.

The fundamental aspect of long term care and nursing home information systems implementation relates to patient treatment flexibility. The ability to be responsive to changing patient conditions is central to the task of controlling nursing home and skilled nursing facility costs. The ability of systems to support flexibility in managing patients to lower cost care delivery sites is anticipated to spur rapid growth of the electronic patient record for these facilities. Long term care and nursing home information systems markets at \$225.8 million in 2009 are anticipated to reach \$674.9 million by 2016.

Nursing Home Long Term Care Facility Information Systems, Software as a Service (SaaS), Medicare Nursing Home Analysis, Nursing Home Information Systems electronic medical record. Electronic patient record, electronic healthcare record, pharmacy systems for LTC, LTC, Systems Resident Assessment Instrument (RAI), Point of Care POC , EMR, EHR, [www.wintergreenresearch.com](http://wintergreenresearch.com) <http://wintergreenresearch.com/reports/LongTermCareIS.htm>

YOU MUST HAVE THIS STUDY

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Companies Profiled

Market Leaders

Meditech
PointClickCare
American Health Tech
Cerner
GE Healthcare
Philips Healthcare
Keane MDI
McKesson

Long Term Care and Nursing Home Market Participants

Selected Company Profiles

AOD Software
Golden Rule Software
Green Mountain Software
Hann's On Software
Optimus EMR
MediServe
Siemens
SigmaCare

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Long Term Care Software Market Shares, Strategies, And Forecasts, Worldwide, 2010 to 2016

Report Methodology

This is the 451st report in a series of primary market research reports that provide forecasts in solar energy, robots, communications, telecommunications, the Internet, computer, software, telephone equipment, health equipment, and batteries to store energy. Automated process and significant growth potential are a priorities in topic selection. The project leaders take direct responsibility for writing and preparing each report. They have significant experience preparing industry studies. Forecasts are based on primary research and proprietary data bases.

The primary research is conducted by talking to customers, distributors and companies. The survey data is not enough to make accurate assessment of market size, so WinterGreen Research looks at the value of shipments and the average price to achieve market assessments. Our track record in achieving accuracy is unsurpassed in the industry. We are known for being able to develop accurate market shares and projections. This is our specialty.

The analyst process is concentrated on getting good market numbers. This process involves looking at the markets from several different perspectives, including vendor shipments. The interview process is an essential aspect as well. We do have a lot of granular analysis of the different shipments by vendor in the study and addenda prepared after the study was published if that is appropriate.

Forecasts reflect analysis of the market trends in the segment and related segments. Unit and dollar shipments are analyzed through consideration of dollar volume of each market participant in the segment. Installed base analysis and unit analysis is based on interviews and an information search. Market share analysis includes conversations with key customers of products, industry segment leaders, marketing directors, distributors, leading market participants, opinion leaders, and companies seeking to develop measurable market share.

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Over 200 in depth interviews are conducted for each report with a broad range of key participants and industry leaders in the market segment. We establish accurate market forecasts based on economic and market conditions as a base. Use input/output ratios, flow charts, and other economic methods to quantify data. Use in-house analysts who meet stringent quality standards. Interviewing key industry participants, experts and end-users is a central part of the study. Our research includes access to large proprietary databases. Literature search includes analysis of trade publications, government reports, and corporate literature.

Findings and conclusions of this report are based on information gathered from industry sources, including manufacturers, distributors, partners, opinion leaders, and users. Interview data was combined with information gathered through an extensive review of internet and printed sources such as trade publications, trade associations, company literature, and online databases. The projections contained in this report are checked from top down and bottom up analysis to be sure there is congruence from that perspective.

The base year for analysis and projection is 2009. With 2009 and several years prior to that as a baseline, market projections were developed for 2010 through 2016. These projections are based on a combination of a consensus among the opinion leader contacts interviewed combined with understanding of the key market drivers and their impact from a historical and analytical perspective. The analytical methodologies used to generate the market estimates are based on penetration analyses, similar market analyses, and delta calculations to supplement independent and dependent variable analysis. All analyses are displaying selected descriptions of products and services.

This research includes referencde to an ROI model that is part of a series that provides IT systems financial planners access to information that supports analysis of all the numbers that impact management of a product launch or large and complex data center. The methodology used in the models relates to having a sophisticated analytical technique for understanding the impact of workload on processor consumption and cost.

WinterGreen Research has looked at the metrics and independent research to develop assumptions that reflect the actual anticipated usage and cost of systems. Comparative analyses reflect the input of these values into models.

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The variables and assumptions provided in the market research study and the ROI models are based on extensive experience in providing research to large enterprise organizations and data centers. The ROI models have lists of servers from different manufacturers, Systems z models from IBM, and labor costs by category around the world. This information has been developed from WinterGreen research proprietary data bases constructed as a result of preparing market research studies that address the software, energy, healthcare, telecommunications, and hardware businesses.

Long Term Care and Nursing Home Information Systems Market Shares, Strategies, and Forecasts, Worldwide, 2010-2016

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ABOUT THE COMPANY

WINTERGREEN RESEARCH, IS ABLE TO IDENTIFYING MARKET TRENDS THROUGH PRIMARY RESEARCH TECHNIQUES. THE EMPHASIS IS ON DEVELOPING ACCURATE NUMBERS THAT INCLUDE UNDERSTANDING DEVELOPMENTS, INTERVIEWING DISTRIBUTORS AND USERS, AND INTERVIEWING OPINION LEADERS. BY READING THE ELECTRONIC EQUIVALENT OF 40 FEET OF PAPER, **WINTERGREEN RESEARCH** SENIOR ANALYSTS CAN LEARN A LOT MORE ABOUT MARKETS, A LOT FASTER THAN CAN BE LEARNED THROUGH SURVEYS AND FOCUS GROUPS THAT ARE INHERENTLY LIMITED BECAUSE THEY ARE NOT ACCURATE. THINKING ABOUT MARKET TRENDS IS A HIGH PRIORITY AT **WINTERGREEN RESEARCH**. AS WITH ALL RESEARCH, THE VALUE PROPOSITION FOR COMPETITIVE ANALYSIS COMES FROM INTELLECTUAL INPUT AND FILTERING OF INFORMATION FOR THE PURPOSE OF ACHIEVING INTEGRATION INSIGHT.

THE ABILITY TO IDENTIFY MARKET TRENDS IS ENHANCED BY **DOING IT** OVER AND OVER FOR MANY DIFFERENT MARKETS. THAT IS WHAT **WINTERGREEN RESEARCH** IS ALL ABOUT: READING AND THINKING IS AN ESSENTIAL ASPECT OF COMPETITIVE ANALYSIS. IDENTIFYING AND TALKING TO OPINION LEADERS IS THE ESSENTIAL ASPECT OF PRODUCING GOOD, RELIABLE DATA.

WINTERGREEN RESEARCH, FOUNDED IN 1985, PROVIDES STRATEGIC MARKET ASSESSMENTS IN TELECOMMUNICATIONS, COMMUNICATIONS EQUIPMENT, HEALTH CARE, INTERNET AND ADVANCED COMPUTER TECHNOLOGY. INDUSTRY REPORTS FOCUS ON OPPORTUNITIES THAT EXPAND EXISTING MARKETS

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OR DEVELOP MAJOR NEW MARKETS. THE REPORTS ASSESS NEW PRODUCT AND SERVICE POSITIONING STRATEGIES, NEW AND EVOLVING TECHNOLOGIES, AND TECHNOLOGICAL IMPACT ON PRODUCTS, SERVICES, AND MARKETS. MARKET SHARES ARE PROVIDED. LEADING MARKET PARTICIPANTS ARE PROFILED, AND THEIR MARKETING STRATEGIES, ACQUISITIONS, AND STRATEGIC ALLIANCES ARE DISCUSSED. THE PRINCIPALS OF WINTERGREEN RESEARCH HAVE BEEN INVOLVED IN ANALYSIS AND FORECASTING OF INTERNATIONAL BUSINESS OPPORTUNITIES IN TELECOMMUNICATIONS AND ADVANCED COMPUTER TECHNOLOGY MARKETS FOR OVER 30 YEARS.

ABOUT THE PRINCIPAL AUTHORS

ELLEN T. CURTISS, TECHNICAL DIRECTOR, CO-FOUNDER OF WINTERGREEN RESEARCH, CONDUCTS STRATEGIC AND MARKET ASSESSMENTS IN TECHNOLOGY-BASED INDUSTRIES. PREVIOUSLY SHE WAS A MEMBER OF THE STAFF OF ARTHUR D. LITTLE, INC., FOR 23 YEARS, MOST RECENTLY AS VICE PRESIDENT OF ARTHUR D. LITTLE DECISION RESOURCES, SPECIALIZING IN STRATEGIC PLANNING AND MARKET DEVELOPMENT SERVICES. SHE IS A GRADUATE OF BOSTON UNIVERSITY AND THE PROGRAM FOR MANAGEMENT DEVELOPMENT AT HARVARD GRADUATE SCHOOL OF BUSINESS ADMINISTRATION. SHE IS THE AUTHOR OF RECENT STUDIES ON WORLDWIDE TELECOMMUNICATIONS MARKETS, THE TOP TEN INTERNET EQUIPMENT COMPANIES, THE TOP TEN CONTRACT MANUFACTURING COMPANIES, AND THE TOP TEN TELECOMMUNICATIONS MARKET ANALYSIS AND FORECASTS.

SUSAN EUSTIS, PRESIDENT, CO-FOUNDER OF WINTERGREEN RESEARCH, HAS DONE RESEARCH IN COMMUNICATIONS AND COMPUTER MARKETS AND APPLICATIONS. SHE HOLDS SEVERAL PATENTS IN MICROCOMPUTING AND PARALLEL PROCESSING. SHE HAS THE ORIGINAL PATENTS IN ELECTRONIC VOTING MACHINES. SHE HAS NEW PATENT APPLICATIONS IN FORMAT VARYING, MULTIPROCESSING, AND ELECTRONIC VOTING. SHE IS THE AUTHOR OF RECENT STUDIES OF SOA MARKETING STRATEGIES, INTERNET EQUIPMENT, CLOUD COMPUTING, BIOMETRICS, A STUDY OF INTERNET EQUIPMENT, WORLDWIDE TELECOMMUNICATIONS EQUIPMENT, TOP TEN TELECOMMUNICATIONS, DIGITAL LOOP CARRIER, WEB HOSTING, WEB SERVICES, ENERGY MARKETS, ELECTRIC VEHICLES, THIN FILM BATTERIES, BUSINESS PROCESS MANAGEMENT, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

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