
Tele Health Monitoring: Localization of the Web and Marketing Campaigns

WinterGreen Research, Inc.
Lexington, Massachusetts

Torrie The Cat in the Tulips and Elvis the Big Black Dog Carrying His Stick

Picture by Susan Eustis

WinterGreen Research, INC.

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LEXINGTON, Massachusetts (June 3, 2011) – WinterGreen Research announces that it has a new study on Tele-Health Monitoring Market Shares and Forecasts, Worldwide, 2011-2017. The 2011 study has 443 pages, 156 tables and figures. Tele monitoring is evolving more sophisticated ways of monitoring vital signs in the home, thus protecting people in a familiar, comfortable environment. The improvement in care delivery that is possible using vital signs monitoring in the home is dramatic and promises to lower the total cost of care delivery.
Once people are facing hospitalization and re-hospitalization, they tend to be more attentive to healthy lifestyle and to be amenable to learning about what needs to be done to take care of a condition. Tele-monitoring provides a way to track vital signs and intervene at a sign of deterioration in condition.

Telemonitoring systems support the premise that proactively reaching out to people with chronic disease provides a means for getting them to change behavior in a way that will support better lifestyle, lifestyle more suited to taking care of the physical body. It is really difficult to get people to take care of themselves, they make all manner of inappropriate decisions. Education as to healthy lifestyle needs to be initiated much earlier in life. Perhaps the definition of intelligence could be transformed to mean those who know best how to care for themselves in a healthy manner.

US Medicare CMS defines telehealth as remote health care delivery via monitoring. A healthcare provider can connect more consistently with patients. Telehealth: phone monitoring is the implementation of scheduled encounters via the telephone. Telemonitoring relates to the collection and transmission of vital signs clinical data through electronic information processing technologies. Quality improvement organizations (QIOs) assist home health agencies in implementing telehealth tools to reduce acute care hospitalization.

According to Susan Eustis, the principal author of the study, “The advantage of telemonitoring is that it increases patient compliance. The aim is to improve the delivery of healthcare to clients by monitoring vital signs to detect changes in patient condition that may indicate the onset of a more serious event, much as nurses in the hospital monitor patient vital signs for the purpose of permitting sophisticated care delivery.”

The aim of telemonitoring is to improve patient compliance with standards of care known to support improved outcomes for patients with chronic conditions. Tele-monitoring is one way to improve patient compliance, but there are other ways to achieve that as well.

Chronic condition care requires daily, real-time monitoring of physiological data, direct patient feedback, coaching, and a high level of patient-clinician interaction to achieve positive results. With the geographical distance widening between doctors and their patients, the problem solution depends on: digital literacy and effective multimodal communication.

Home patient monitoring means two things: the imminent rise of the expert patient whom the health authorities anticipate would self-manage his long-term medical conditions and the prominence of mobile devices as the go-between for clinicians and patients.

Left to their own judgments, patients typically are apt to make terrible decisions relating to their personal health. The ability to accurately access patient condition via telemonitoring creates the opportunity to intervene when that is called for clinically, and to provide education regarding healthy living in a way that is likely to create compliance with clinician recommendations.
Home telemonitoring programs need to use advanced technology. Effective monitors support patient education. They support timely clinician intervention based on real vital signs data gathered on a daily basis. Health care for patients with congestive heart failure has been shown to be successful in reducing hospitalizations and trips to the emergency department, making these critical measures unnecessary in many cases.

Wireless telemonitoring devices enable taking vital signs measurements at home and in remote locations. Telemonitoring devices mean a consulting physician can remotely monitor a patient’s health status and chronic condition can be gathered in real time.

Telemonitoring gives patients far more choices about how and when to react in case of change in medical condition, before a full blown emergency occurs. No matter if the patient is at home, on the bus, at the movies or anywhere in the course of daily life, wireless telemonitoring supports a more mobile lifestyle. Consistent and real time oversight greatly improves ongoing treatment, keeps patients healthier, and avoids expensive hospitalization.

Healthcare services providers use tele-monitoring technology to improve patient care and reduce nurse visits. This has led the industry to point to inconclusive studies. More work is needed to identify the particular patient profiles of those most likely to benefit from telemonitoring in these double blind studies.

Tele-health monitoring equipment markets are growing because units decrease the cost of care delivery while improving the quality of care and the quality of lifestyle available to patients. Healthcare delivery is an increasing concern worldwide. Markets at $607.5 million in 2010 are anticipated to reach $3.1 billion by 2017.

Keywords: Chronic heart failure, CHF, Chronic heart disease, Telehealth, Telemedicine, Telemonitoring, CMS Telemonitoring, Heart disease treatment efficacy, Care Management, CMHCB, Health Buddy System, Medicare Monitoring, Remote patient monitoring, Heart failure mortality, Health economics, Heart Failure, Heart Diseases, Cardiovascular Diseases, Behavior CHF patient, Behavior Modification, Telemedicine, Hypertension monitoring, chronic heart disease telemonitoring, Health care delivery efficacy, Chronic Diseases Monitoring, Health Services and Systems, Telehealth, DRE, Health Monitoring, Health Communication, Aging, Monitoring Technology, Health engagement, Medical innovation, Mobile health, Remote health monitoring, Clinical communication, Medical communication, Telemedicine, Telehealth, Tele-health, Remote medical support, Telepharmacy, Seniors and health, Diabetes Monitoring, Telemedicine, Remote patient monitoring, Chronic heart failure mortality, health economics, Heart Failure, Heart Diseases, Cardiovascular Diseases, Quality of Care, American Medical Group Association, Department of Veterans Affairs telemonitoring, Chronic disease management, Health Buddy System Healthcare telemonitoring, Medicare telemonitoring, Bosch telehealth, Treatment Monitoring, http://wintergreenresearch.com/reports/tele-monitoring.html

Companies Profiled

Market Leaders

Bayer HealthCare / Viterion TeleHealthcare
Intel® GE Care Innovations
Philips
Bosch Group

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### Tele-Health Monitoring: Market Shares, Strategies, and Forecasts, Worldwide, 2011 to 2017

### Report Methodology

This is the 471st report in a series of primary market research reports that provide forecasts in communications, telecommunications, the Internet, computer, software, telephone equipment, health equipment, and energy. Automated process and significant growth potential are 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.

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 2010. With 2010 and several years prior to that as a baseline, market projections were developed for 2011 through 2017. 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 reference 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.

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.

YOU MUST HAVE THIS STUDY
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ABOUT THE PRINCIPAL AUTHORS


SUSAN EUSTIS, PRESIDENT, CO-FOUNDER OF WINTERGREEN RESEARCH, IS A SENIOR ANALYST. SHE HAS DONE RESEARCH IN COMMUNICATIONS, HEALTHCARE EQUIPMENT, 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 THE REGIONAL BELL OPERATING COMPANIES' MARKETING STRATEGIES, INTERNET EQUIPMENT, BIOMETRICS, A STUDY OF INTERNET EQUIPMENT, WORLDWIDE TELECOMMUNICATIONS EQUIPMENT, TOP TEN TELECOMMUNICATIONS, DIGITAL LOOP CARRIER, WEB HOSTING, WEB SERVICES, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

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