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Home Healthcare Software - Product & Service Market - Application (Clinical, Non - Clinical), Usage (Laptop, Smartphone), Product (Agency, Clinical Management System, Telehealth, Hospice), Delivery (Web - Based, On - Premises, Cloud), End User - Global Forecast to 2018

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Abstracts

Homecare-EMR, electronic point-of-care documentation, and homecare-CRM are lucrative markets for investors

Several initiatives and healthcare reforms have been developed in order to support the adoption and implementation of homecare software, especially hospital readmission program by Affordable Care Act, and new health plan budget approved by Obama's care where reimbursement value is cut down by 1.1%.

Clinical management system accounted for the largest share-35%- of global home healthcare software and services market. Clinical Management system and telehealth solutions are estimated to grow at brisk pace over the next five years. The high growth in these segments can be attributed to the growing demand for quality care at point-of-care, real time access of patient's data, and rising medication errors. Furthermore, the implementation of this system will help in reducing healthcare costs, and re-admission rates.

By application, non-clinical solutions accounted for the largest share of 53% of the home healthcare software and services market. Homecare-CRM will be the non-clinical application that will gain maximum share in the market by 2018. The key growth attractants in the clinical solutions are homecare-EMR, and electronic point-of-care

documentation.

New technologies such as cloud computing, mobile technology, and telehealth solutions have emerged as efficient models to transform the healthcare system. Cloud computing segment offers significant benefits to the healthcare sector. It provides quick access to patient data, ability to share information more easily, and also improves operational efficiency. Owing to these factors, this segment is expected to be a major revenue pocket for the homecare software market in the coming years.

Countries such as China, India, South Korea, and Australia will also offer potential growth opportunities to homecare software and services stakeholders. Saudi Arabia, Qatar, Bahrain, and Brazil will also emerge as lucrative markets for homecare software and services providers.

Above all, the updated version of OASIS documentation and ICD 10 conversation system offers tremendous opportunities to homecare software vendors as there will be an increase in demand for training, and software development and testing.

The grey area while estimating the market size is the fragmented nature of the market from both suppliers end as well as consumers end, and complex structure of homecare solutions.

From an insight perspective, this research report focuses on the qualitative data, market size, share, and growth of various segments and sub-segments, competitive landscape, and company profiles.

The qualitative data covers various levels of industry analysis, such as market dynamics (drivers, restraints, opportunities, and threats), and porter’s five forces analysis at global level. The report also offers market shares, sizes, and related growth of various segments in the industry. It also focuses on the emerging and high-growth segments of homecare software and services market (Clinical management system, telehealth solution, homecare EMR, and homecare CRM), high-growth regions, and the initiatives of their respective governments.

The competitive landscape covers the growth strategies adopted by industry players in the last three years. The company profiles comprise the basic views on the key players in the homecare software and services market and the product portfolios, developments, and strategies adopted by market players to maintain and increase their market shares in the near future. The above-mentioned market research data, current market size, and forecast of future trends will help the key players and new entrants to make the necessary decisions regarding product offerings, geographic focus, change in strategic approach, R&D investments for innovations in products and technologies, and levels of output in order to remain successful.

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About

The home healthcare software and services market has picked up pace in recent years due to the introduction of new technologies such as mobile health, telehealth, and cloud computing.

The global homecare software and services market is estimated to reach $XX million by 2018 at a CAGR of XX% during the forecast period (2013 to 2018). Market dynamics analysis has identified that rising budgetary pressure to reduce healthcare expenditures, increasing aging population, rising incidences of various diseases, medication errors, the growing need to integrate homecare IT solutions, improved quality of care and clinical outcomes, and increasing government initiatives are significant factors propelling the market in the forecast period.

Furthermore, the increasing rate of readmissions will bring about a shift from hospital care to homecare, a significant factor propelling the homecare software and services market. On the other hand, rising incidences of data breach and loss of confidentiality, high maintenance and service expenses, shortage of trained IT professionals, and lack of standard protocols are the factors that hinder the market.

The homecare software and services market is segmented by product, application, mode of usage, delivery mode, component, and end user. Based on products, the homecare market is further segmented into agency solutions, clinical management systems, hospice solutions, and telehealth solutions. Of all the segments, clinical management systems accounted for the largest share of XX% in 2013 and telehealth will be the fastest-growing market, at a CAGR of XX% in the coming five years.

Based on applications, the homecare market is segmented into clinical and non-clinical applications. The homecare CRM segment will witness the fastest growth at an estimated CAGR of XX% in the non-clinical applications market, while the homecare EHR segment will grow at the fastest rate in the clinical applications segment.

The three most important delivery modes considered for the study are web-based, on-premises, and cloud-based. The cloud-based mode of delivery is expected to grow at the highest CAGR of XX% during the forecast period (2013–2018) to reach $XX million by 2018.

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From an end user perspective, the market is segmented into homecare agencies, hospice agencies, private duty centers, and others (including rehabilitation centers). The homecare agencies segment accounted for the largest share of XX% of the overall homecare software and services market in 2013.

Geographic analysis reveals that North America dominated the global homecare software and services market, with a share of XX% in 2013. Asia, on the other hand, is poised to grow at a moderate CAGR of XX% from 2013 to 2018.

The key players in the market are McKesson Corporation (U.S.), Thornberry Limited (U.S.), Kinnser Software (U.S.), Cerner Corporation (U.S.), Hearst corporation (U.S.), MEDITECH (U.S.), Carestream Health, Inc. (U.S.), athenahealth, Inc. (U.S.), Siemens Healthcare (Germany), Allscripts Healthcare Solutions, Inc. (U.S.), GE Healthcare (U.K.), Agfa Healthcare (Belgium), NextGen Healthcare Information System LLC (U.S.), Novarad Corporation (U.S.), and Epic (U.S.).

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