

Healthcare Decision Support and IBM Watson: Market Shares, Strategies, and Forecasts, Worldwide, 2013 to 2019

<https://marketpublishers.com/r/H56DE28AE33EN.html>

Date: March 2013

Pages: 281

Price: US\$ 3,800.00 (Single User License)

ID: H56DE28AE33EN

Abstracts

WinterGreen Research announces that it has published a new study Healthcare Decision Support and IBM Watson Market Shares, Strategy, and Forecasts, Worldwide, 2013 to 2019. The 2013 study has 271 pages, 87 tables and figures. Worldwide healthcare cognitive computing markets are poised to achieve continuing growth as the healthcare delivery system responds to new products. Growth is achieved in response to changing technology, better analytics, and new information systems that leverage natural language, and changing market conditions.

Healthcare decision support markets consist of traditional market participants led by McKesson and Watson from IBM. IBM Watson offers structured and unstructured data in combination. This represents a major breakthrough in what kind of decision support can be offered.

IBM Watson can provide a far more differentiated testing assessment. Watson knows what tests are relevant to further characterize a particular patient condition and what tests are not.

It is a great help to physicians to have an assistant that is able to have read the latest journal articles and is loaded with medical information to recommend what tests may be relevant in a particular situation. Wrong tests, tests that are not useful in a particular situation, account for 30% of the costs of healthcare delivery in the US. This is a lot. To have a new system available that addresses these issues is great.

IBM Watson is initiating a new era of cognitive computing that extends the tabulator and application program intensive enabling new market opportunities based on cognitive

performance. Watson is so powerful and so new that the uses for it are not even defined yet. The tools and methods released by natural language computing systems are remarkable. They are very exciting.

Watson is comprised of a core engine. This engine is more powerful than anything that has been designed by humans before. To the credit of IBM, the first purpose that Watson has been put to is to improve healthcare delivery. To those analysts following Watson, there is tremendous promise in the offing.

IBM concentrates on building end to end systems that are able to adapt of market changes. While this may make the IBM product set seem overly heavy in the short run, in the long run, this is of enormous value to clients as proved by the company market leading position in innovation software.

This forecast below is predicated on the assumption that IBM makes available the Watson cognitive computing capability worldwide as a SaaS tool immediately, and people with smart phones learn that for five cents they can access solid medical opinions relating to particular symptoms. This does not turn the consumer into a healthcare provider, but it gives the consumer more power in dealing with the physician and the provider.

Just as the mother that took her child to the doctor this week in February 2013, and said, 'I think it is an appendicitis' and the doctor said 'No, it is influenza.', after the appendix broke and threatened the life of the child, the mother was angry, the physician was apologetic. With Watson at her side, the mother would have had more credible authority with the doctor.

This scenario really happened to an esteemed marketing manager in Minnesota, USA this week in February 2013. Watson has a lot to offer the consumer, without making the consumer a doctor; it brings more information and authority to the patient - physician interaction.

So also, the physicians gain a valuable assistant at their side when they can access Watson for \$60 per physician per month. This cost represents two cents per patient encounter, hardly a blip on the bill to the patient, but lends incredible value to the patient - physician interaction, bringing the latest research to bear on the physician diagnostic and therapeutic decision making process.

Watson can be loaded with the latest research results. No physician can track all the

latest medical research; there are intense volumes of it. Any one physician can only hope to read a small portion of what is published in his or her own field. Watson knows it all. It is available to share what it knows at a small fee.

Healthcare decision support markets at \$201.7 million in 2012 are anticipated to reach \$239 billion by 2019 as consumers access apps and these apps generate micro-payments in increments of \$.05 per query. Physician access is anticipated to be at a cost of \$60 per month per physician, and every facility will have to give its physicians access to IBM Watson and cloud based healthcare decision support.

Personal, consumer queries are anticipated to account for 93% of the healthcare decision support revenue by 2019. Growth is a result of new cognitive computing technology availability. It is not enough to maintain a static position in a market, nimble competitors steal market share away if innovation is not pursued, this is increasingly true in the healthcare decision support markets. Innovation provides competitive advantage and protection of market position.

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