

# Telemedicine Monitoring: Market Shares, Strategies, and Forecasts, Worldwide, 2012 to 2018

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## Abstracts

WinterGreen Research announces that it has published a new study Telemedicine. Market Shares, Strategy, and Forecasts, Worldwide, 2012 to 2018. The 2012 study has 590 pages, 206 tables and figures. Worldwide markets are poised to achieve significant growth as the telemedicine systems provide a way to improve clinical care delivery to patients with chronic disease, decreasing hospitalizations and visits to the emergency room.

Chronic disease conditions are best treated early on when there is a change in patient condition and an early intervention can make a difference. It is even better to treat them in a wellness treatment environment before there are indications of chronic disease, before symptoms develop, by addressing lifestyle issues early on.

Left to their own judgments, some patients typically are apt to make terrible decisions relating to their personal health either because of ignorance, genetic inheritance, or because of lifestyle habit. The ability to accurately assess patient condition via a combination of advanced testing and telemonitoring creates the opportunity to intervene when what is called for clinically can make a difference, and permits provision for 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.

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Telemedicine device and software companies recognize that their revenue stream will come from services delivery. Just as cell phones are paid for in conjunctions with the services contracts, so also the telemedicine applications will be paid by insurance. In some cases the insurance companies recognize that their long term costs are lower by delivering clinical intervention to try to impact lifestyle for patients with chronic disease conditions.

The telemedicine in the home is cheaper than the consequent emergency room visits and hospitalizations that occur if chronic conditions are ignored. There is a certain inevitability related to chronic disease condition care delivery. People that take care of themselves tend to stay healthy. People that are not attentive to protecting their health tend to have medical conditions that contribute to deteriorating health and benefit from early intervention when it is delivered in a manner to which the person can relate. Telemedicine is, at its core, a way to extend clinical services to make them part of lifestyle consultation. . It provides a way to initiate two way communications with a patient, forever changing the doctor - patient relationship to a collaborative one. It means that physicians need to build collaboration skills or delegate those to their nurses which they have always done, but this time in a more effective manner, on that is supported by technology.

Telemedicine systems come from Honeywell, Vitarian, and Bosch Diagnostic Support Expert Systems. Tablets are poised to change telemedicine as are telepresence systems from Logitech among others. Clinical diagnosis is being impacted by the decision support systems. Clinical decision support systems (CDSS) have been a key aspect of telemedicine. Bosch offers the ability to track and update on a daily basis, questions that are able to address actual situations that patients face.

Diagnostic support expert systems promise to revolutionize healthcare. The mandated electronic health record (EHR) systems in all healthcare facilities, is a key enabler of

diagnostic support expert systems.

The objectives are to promote better and cheaper healthcare using diagnostic support based on the patient data collected from the telemedicine systems. With the large amount of new data collected by the newly installed EHR systems, computers like the Watson will be able to find optimal answers to clinical questions much more efficiently than the human mind.

Two major categories are diagnostic support tools and treatment support tools. Chronic conditions requires continuous diagnostic support because a continuous flow of information on patient change in conditions helps physicians make a better diagnosis based on the patient symptoms, medications, and medical records.

Treatment support helps clinicians stay compliant with known treatment guidelines such as avoiding known drug interactions, dispensing the right medication to the right patients, and staying on schedule with response to changes in patient condition.

According to Susan Eustis, lead author of the WinterGreen Research team that prepared the telemedicine market research study, 'Differential diagnostic tools support differential telemedical treatment. The decision process take into account clinical findings form the home monitoring devices and from symptoms verbally communicated in a clinical services implementation.'

She continued, 'Care delivery is enhanced by having clinicians be responsive to changes in patient condition that we know will lead to further patient deterioration if not treated immediately. A core part of responsible healthcare delivery is to use technology for healthcare reform. There is a focus on how to deliver care differently using telemedicine. No matter who pays for it, the use of telemedicine is anticipated to reduce the overall costs of healthcare delivery. Innovation is key to achieving improvements.'

For long-term success, telehealth solutions require sustainable financing models. Investments in telehealth technologies foster sustainability by enabling productivity and efficiency gains and other improvements that can more than justify investment costs.

Government and local authorities have long recognized the potential of telehealth technology as a tool for delivering health and social care services. This is an increasing imperative given the increasing age demographic and the backdrop of static or reducing funding. Telehealth initiatives must demonstrate credibility and viability beyond the pilot and trial programs in order to achieve the goal of increased capability through

technology.

Device installer partners define benefits in terms of increased sales and consultancy. A sustaining finance model is an essential aspect of telehealth. Telemedicine is analogous to the telecommunications industry where a large upfront investment is required and, usage models and complementary technologies must emerge and finally they must be integrated into existing healthcare service delivery paradigms.

Workflows are required to integrate the telehealth components into the existing solutions. This is possibly the area of greatest challenge. Upfront costs are high. Once the telehealth solution has been implemented initiatives are cost effective.

Since insurance companies have the responsibility for taking care of all people, not just the healthy ones and the health conscious people, they benefit from encouraging the use of telemedicine. The US veterans' administration recognizes this reality and has in place extensive telemedicine programs. While some hospitals benefit from an increase in hospitalizations, insurers do not.

There is a services component to the business that makes it attractive to sell the devices below cost. The tablet market revolutionizes telemedicine.

Once FDA approved software runs on a tablet, people with an existing unit can download software and be equipped with a way to interact with the clinical service that performs monitoring. Long term, the services will be a very attractive part of telemonitoring.

Telemedicine dedicated device and software markets at \$736 million in 2011 are anticipated to reach \$2.5 billion by 2018. Table devices typically cost \$350 in 2011, with the average price of the software at \$75 per unit. This means there is a services business that will pay for the devices over time.

WinterGreen Research is an independent research organization funded by the sale of market research studies all over the world and by the implementation of ROI models that are used to calculate the total cost of ownership of equipment, services, and software. The company has 35 distributors worldwide, including Global Information Info Shop, Market Research.com, Research and Markets, Bloomberg, and Thompson Financial.

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