

Connected Care in North America

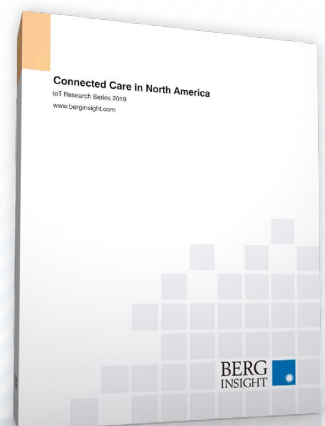


Connected Care in North America is a comprehensive report from Berg Insight analysing the latest developments on the medical alert system, connected medication management and remote patient monitoring (RPM) markets in this region.

This strategic research report from Berg Insight provides you with 170 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

This report will allow you to:

- **Profit** from 20 executive interviews with market leading companies.
- **Identify** key players in the connected care ecosystem.
- **Learn** about the latest developments in connected care devices and services.
- **Understand** the dynamics of the North American healthcare system.
- **Evaluate** the business opportunities in the emerging connected medication management segment.
- **Benefit** from expert market analysis including detailed market forecasts lasting until 2024.



Order now!

Please visit our web site to order this report and find more information about our other titles at www.berginsight.com

See inside for further details →

Berg Insight's M2M Research Series

What are the key business opportunities in the emerging wireless M2M/IoT market? Berg Insight's M2M Research Series is a unique series of 40 market reports published on a regular basis. Each title offers detailed analysis of a specific vertical application area such as smart homes, smart metering, fleet management and car telematics, or covers horizontal topics including IoT platforms, software, hardware, IoT connectivity statistics and the mobile operators' IoT strategies.

www.berginsight.com



Connected care revenues in North America will reach US\$ 30.0 billion by 2024

The ageing population and the increasing prevalence of chronic diseases will be two of the greatest challenges in North America during this century. It is widely believed that connected care solutions can ease the burden on society by enabling more efficient delivery of care and allowing people to live independently for longer. Berg Insight's definition of connected care includes medical alert systems, connected medication management solutions and remote patient monitoring (RPM) solutions. Medical alert systems, also known as personal emergency response systems (PERS), comprises solutions that trigger an alarm when the user presses a button or when a passive sensor detects an accident. Connected medication management solutions comprise medication dispensers, pillboxes, pill bottles, vials caps, blister packages, injection devices, insulin pumps and inhalers that are connected to a monitoring platform to improve medication adherence. RPM solutions comprise connected medical devices and monitoring services that are used for remote management of patients suffering from arrhythmia, asthma, chronic kidney disease, chronic obstructive pulmonary disease, congestive heart failure, coronary artery disease, diabetes, hypertension or obstructive sleep apnea.

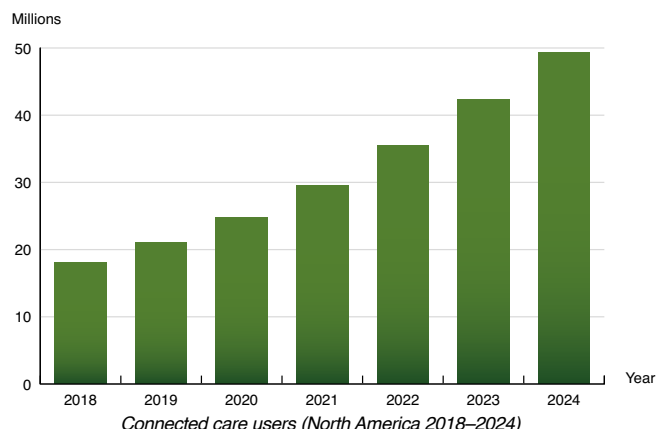
At the end of 2018, there were 18.0 million people that relied on connected care services in North America. RPM is the largest and most mature segment of the connected care market having a total of 16.1 million users at the end of 2018. The market for medical alert systems is considerably smaller with an estimated total of 3.1 million users, whereas the number of connected medication management users reached 900,000 at the end of 2018. There is an overlap between the market segments as medical alert users can also be equipped with a medication management solution or an RPM solution, and vice versa. The market is forecasted to grow at a compound annual growth rate (CAGR) of 18.3 percent during the next six years to reach 49.4 million connected care users by 2024. Berg Insight expects that RPM will remain the largest segment of the connected care market with a forecasted 47.4 million users in 2024. The number of connected medication management users and medical alert system users will at the same time reach 3.2 million and 4.3 million respectively.

Berg Insight estimates that connected care revenues in North America reached US\$ 12.5 billion in 2018. This includes revenues from medical alert systems, connected medication management solutions and ►

► RPM solutions. The market is expected to grow at a CAGR of 15.7 percent in the following six years to reach US\$ 30.0 billion in 2024. RPM solutions accounted for the largest share of the market in 2018 and will remain in lead for the foreseeable future. Revenues from medication management solutions will grow the fastest at a CAGR of 24.2 percent during the forecast period, overtaking the medical alert system market already in 2019.

The market for RPM solutions involves a wide range of actors, from specialised equipment vendors to integrated mHealth solution providers. The leading RPM application has thus far been sleep therapy compliance monitoring. Patients that suffer from sleep-disordered breathing such as obstructive sleep apnea (OSA) are typically prescribed an airflow generator. However, many patients find the devices unpleasant to use and poor compliance is common. Payers increasingly require that patients comply with their treatment plans to be reimbursed for the device which has driven equipment vendors to connect the devices. The sleep therapy device segment is dominated by Philips and ResMed. The market for connected medication management solutions represents an interesting growth opportunity for companies from several markets. The use of connected insulin dosing systems has thus far gained most traction, but different connected solutions for pills and inhaled medication are increasingly adopted. In contrast, the market for medical alert systems is mature and key actors include Anelto, Essence Group, GreatCall, LogicMark, MobileHelp, Mytrex, Nortek and Phillips Lifeline.

The North American market for connected care solutions is affected by several trends and developments that will have an impact on the competitive landscape in the next years. Changing demographics is driving the demand for home care, while technological developments and regulatory changes affect the competitive landscape for solution vendors. One of the major ongoing changes is the sunset of the landline telephone networks and cellular 3G networks, which forces equipment providers to upgrade products. At the same time, the industry is becoming more patient-centric which calls for integrated systems and improved interoperability of connected care solutions. New companies are entering the connected care market and connected medication management solutions are today in the centre of attention for start-ups.



This report answers the following questions:

- Which are the main verticals within connected care?
- What are the main drivers on this market in North America?
- How many people are using connected care solutions in the US and Canada?
- What are the general technology trends for connected care products?
- Which are the leading medical alert system providers in North America?
- How will the connected care market evolve in the next six years?
- How will the markets for PERS, medication management and remote patient monitoring (RPM) converge?
- How are new reimbursement policies affecting the connected care market?
- What is the potential market size for cellular IoT connectivity?



Executive Summary

1 Healthcare in North America

1.1 Introduction

- 1.1.1 The ageing population
- 1.1.2 Metabolic syndrome and lifestyle-related diseases

1.2 Chronic diseases

- 1.2.1 Cardiovascular diseases
- 1.2.2 Chronic respiratory diseases
- 1.2.3 Diabetes
- 1.2.4 Obstructive sleep apnea

1.3 Neurological disorders, mental disorders and physical disabilities

- 1.3.1 Autism spectrum disorders
- 1.3.2 Dementia
- 1.3.3 Epilepsy
- 1.3.4 Other disorders and disabilities

1.4 Healthcare systems

- 1.4.1 Healthcare
- 1.4.2 Long-term care

1.5 The regulatory environment

- 1.5.1 Medical device regulations
- 1.5.2 Medical data regulations
- 1.5.3 Standardisation

2 Medical alert solutions

2.1 Market overview

- 2.1.1 Form factors and use cases
- 2.1.2 Value chain
- 2.1.3 Competitive landscape

2.2 Solution providers

- 2.2.1 Anelto
- 2.2.2 BioSensics
- 2.2.3 Climax Technology
- 2.2.4 Connect America
- 2.2.5 Empatica
- 2.2.6 Essence Group
- 2.2.7 Freeus
- 2.2.8 GreatCall
- 2.2.9 GTX Corp
- 2.2.10 Laipac Technology
- 2.2.11 Life Alert Emergency Response
- 2.2.12 LogicMark
- 2.2.13 Medical Guardian
- 2.2.14 MobileHelp

- 2.2.15 Mytrex
- 2.2.16 Nortek
- 2.2.17 Philips Lifeline
- 2.2.18 QMedic
- 2.2.19 SecuraTrac
- 2.2.20 Tunstall Canada

3 Medication management solutions

3.1 Market overview

- 3.1.1 Form factors and use cases
- 3.1.2 Competitive landscape

3.2 Medication management solution providers

- 3.2.1 AdhereTech
- 3.2.2 Adherium
- 3.2.3 Cohero Health
- 3.2.4 Compliance Meds Technologies
- 3.2.5 DayMed
- 3.2.6 E-pill
- 3.2.7 Hero Health
- 3.2.8 Information Mediary Corporation
- 3.2.9 Medipense
- 3.2.10 MedMinder
- 3.2.11 MedReady
- 3.2.12 PharmRight Corporation
- 3.2.13 Pillo Health
- 3.2.14 Propeller Health
- 3.2.15 SMRxT
- 3.2.16 Spencer Health Solutions
- 3.2.17 Valca

4 Remote patient monitoring solutions

4.1 Market overview

- 4.1.1 Form factors and use cases
- 4.1.2 Value chain
- 4.1.3 Competitive landscape

4.2 Solution providers

- 4.2.1 A&D Medical
- 4.2.2 Abbott
- 4.2.3 BioTelemetry
- 4.2.4 Biotronik
- 4.2.5 Boston Scientific
- 4.2.6 Capsule Technologies (Qualcomm Life)

- 4.2.7 Care Innovations
- 4.2.8 Current Health
- 4.2.9 eDevice
- 4.2.10 Fisher & Paykel Healthcare
- 4.2.11 Get Real Health
- 4.2.12 Ideal Life
- 4.2.13 Lark Health
- 4.2.14 Life365
- 4.2.15 Livongo Health
- 4.2.16 Masimo
- 4.2.17 Medtronic
- 4.2.18 Nonin Medical
- 4.2.19 Omada Health
- 4.2.20 Omron Healthcare
- 4.2.21 Philips
- 4.2.22 Resideo (Honeywell)
- 4.2.23 ResMed
- 4.2.24 Roche
- 4.2.25 Tactio Health
- 4.2.26 Telus Health

5 Market forecasts and conclusions

5.1 Market trends and analysis

- 5.1.1 An ageing population increases healthcare expenditures
- 5.1.2 The sunset of 2G and 3G cellular networks is driving launches of 4G devices
- 5.1.3 Standalone systems to be replaced by platform solutions
- 5.1.4 Favourable policies that align financial incentives are driving RPM adoption
- 5.1.5 The growth of lightweight solutions is broadening the market
- 5.1.6 The market for connected medication management is gaining traction
- 5.1.7 From remote patient monitoring to data-driven patient engagement

5.2 Market forecasts

- 5.2.1 Medical alert systems
- 5.2.2 Medication management solutions
- 5.2.3 Remote patient monitoring solutions

5.3 Revenue forecasts

- 5.3.1 Medical alert systems
- 5.3.2 Medication management solutions
- 5.3.3 Remote patient monitoring solutions

Glossary

About the Author



Johan Fagerberg is co-founder and an experienced analyst with a Master's degree in Electrical Engineering from Chalmers University of Technology. He has during the past 22 years published numerous articles and reports about M2M/IoT markets.

Sebastian Hellström is an IoT Analyst with a Master's degree in Innovation and Industrial Management from University of Gothenburg. His areas of expertise include connected care and mHealth.

Berg Insight offers premier business intelligence to the telecom industry. We produce concise reports providing key facts and strategic insights about pivotal developments in our focus areas. Berg Insight also offers detailed market forecast databases and advisory services. Our vision is to be the most valuable source of intelligence for our customers.

Who should buy this report?

Connected Care in North America is the foremost source of information about the medical alert system, connected medication management and remote patient monitoring markets in this region. Whether you are an equipment vendor, care provider, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

Related products

- Connected Care in Europe
- mHealth and Home Monitoring
- Connected Wearables
- Smart Homes and Home Automation

Order form — TO RECEIVE YOUR COPY OF CONNECTED CARE IN NORTH AMERICA

You can place your order in the following alternative ways:

1. Place your order online in our web shop at www.berginsight.com
2. Mail this order sheet to us at: Berg Insight AB, Viktoriagatan 3, 411 25 Gothenburg, Sweden
3. Email your order to: info@berginsight.com
4. Phone us at +46 31 711 30 91

Choose type of format

- ☐ Paper copy 1000 EUR
- ☐ PDF 1-5 user license 1500 EUR
- ☐ PDF corporate license 3000 EUR

Family/Surname	Forename	Position	Company
Address		Country	Postcode
Telephone		Email	

VAT is chargeable on all orders from Sweden. Orders from all other countries in the European Union must include the buyer's VAT Registration number below in order to avoid the addition of VAT.

Your PO number	Your VAT/TVA/IVA/BTW/MWST number
----------------	----------------------------------

Please charge my credit card

☐ VISA ☐ Mastercard

Card number	Expiry date (MM/YY)	CV code
Cardholder's name	Signature	
Billing address		
Postcode	Country	

- ☐ We enclose our cheque payable to Berg Insight AB
- ☐ Please invoice me

Signature	Date
-----------	------

Reports will be dispatched once full payment has been received. For any enquiries regarding this, please contact us. Payment may be made by credit card, cheque made payable to Berg Insight AB, Viktoriagatan 3, 411 25 Gothenburg, Sweden or by direct bank transfer to Skandinaviska Enskilda Banken, 106 40 Stockholm, Sweden.

Account Holder: Berg Insight AB
Account number: 5011 10 402 80
BIC/SWIFT: ESSESESS
IBAN: SE92 5000 0000 0501 1104 0280

