

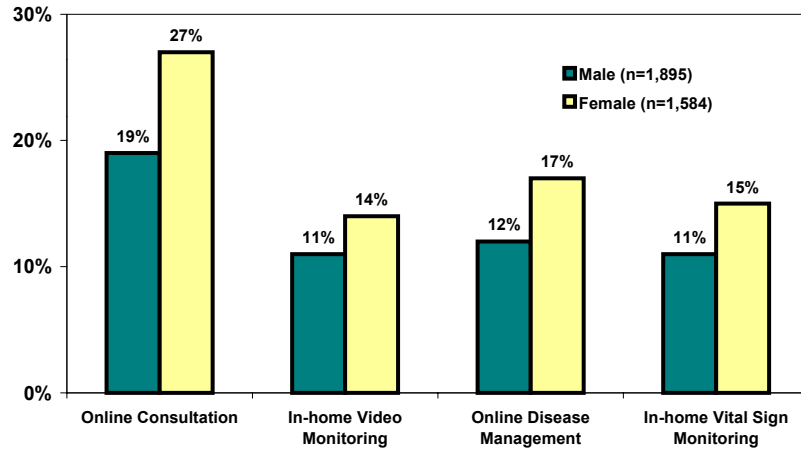
**Synopsis**

This report analyzes the emerging technologies and their applications in the healthcare industry. It focuses on products and services that help consumers manage healthcare at home through advanced communication tools, self-diagnostic devices, and home-monitoring appliances. The report examines incentives, regulatory and reimbursement issues, and the drivers and barriers for the implementation of home-based care services. It also includes player profiles and a future roadmap.

**Publish Date:** Feb 06

**Value of Different Health Services, by Gender**

**Perceived Value of Digital Home Health Services by Gender**  
(Percentage of Respondents Found it Valuable: Ratings 5-7)



Source: *Bundled Services and Residential Gateways: 2005*, an Internet survey of 3,479 U.S. households © 2006 Parks Associates

“With the recent advances in healthcare technologies and improvements in communications infrastructure at home, home healthcare could evolve from a sporadic practice today to a mainstream care delivery model in the next 5-10 years,” said Harry Wang, research Analyst at Parks Associates. “New home-based healthcare services will be consumer-centric and technology driven. We may be on the verge of finding a good solution to reduce healthcare costs while improving overall care quality.”

**Contents**

**The Bottom Line** is a concise, executive-level summary of the current state of the market, evolutionary path, and the implications for companies doing business in this space.

A Parks Associates’ **Resource Book** contains a wealth of consumer survey data and company profiles—a must-have reference for product/market planning.

**The Bottom Line**

**1.0 Notes on Methodology**

- 1.1 Consumer Data
- 1.2 Definitions
- 1.3 Scope of Report

**2.0 Digital Home Health: Myth Unpeeled**

- 2.1 Overview of U.S. Healthcare Industry
- 2.2 Defining Digital Home Health
- 2.3 Key Applications and Services

**3.0 Digital Home Health—Consumer Perspectives**

- 3.1 Targeted Consumer Segments
- 3.2 Technology Infrastructure and Device Ease of Use
- 3.3 Service Quality and Patient Compliance
- 3.4 Privacy and Security
- 3.5 Service Costs and Reimbursement

**4.0 Digital Home Health—Care Provider and Payor Perspectives**

- 4.1 Adoption of Healthcare IT and System Integration

- 4.2 Manage Chronic Diseases and Rein in Healthcare Cost
- 4.3 Service Eligibility and Reimbursement Policies
- 4.4 Medical Liability Issues

**5.0 Government Policies and Legislature Actions**

- 5.1 Government-sponsored Digital Health Initiatives
- 5.2 Medicare and Medicaid Spending and Policies
- 5.3 Government Regulations and Healthcare Legislations

**6.0 Industry Snapshot**

- 6.1 Current Adoption of Digital Home Health Services and Major Players
- 6.2 Industry Evangelists and Potential New Entrants
- 6.3 Summary of Market Drivers and Adoption Barriers

**7.0 Roadmap for the Future**

- 7.1 Impact of Technology on Digital Home Health
- 7.2 New Care Delivery Models
- 7.3 Trends in Public-Private Partnerships
- 7.4 Prospects of Solving the Reimbursement Issue
- 7.5 Forecast of Demand for Digital Home Health Services
- 7.6 Market Implications

**Resource Book**

**Section I: Review of Consumers' Readiness for Digital Home Health Services**

**Section II: Telemedicine, Healthcare Informatics, & e-Health**

**Section III: Technology Overview**

- Universal Serial Bus (USB)
- HomePNA
- HomePlug Power line Alliance Technology
- Wi-Fi® (IEEE 802.11a/b/g)
- Ultra-Wideband (IEEE 802.15.3a)
- ZigBee (IEEE 802.15.4)
- Sensor Technologies

**Section IV: Healthcare Costs and Financing**

**Section V: Digital Health Initiatives from Public and Private Sectors**

**Section VI: Legislations and Reimbursement Policies**

**Section VII: Company Profiles—Technology Vendors and Telemedicine Providers**

- AMD Telemedicine, Inc.
- American TeleCare, Inc.
- Cardiocom
- Eastman Kodak Co.
- GE Healthcare
- Health Hero Networks, Inc.
- Healthsense
- Honeywell HomMed LLC.
- Intel Digital Health
- Living Independently Group, Inc.
- Lusora Inc.
- Medem Inc.
- MedivoxRx Technologies Inc.

Philips Medical Systems  
Relay Health  
RMD Networks, Inc.  
Sensitron Inc.  
Viterion TeleHealth LLC

**Figures**

**The Bottom Line**

U.S. Healthcare Delivery System  
Poor Quality of Care Leads to Preventable Complications or Deaths  
An Ecosystem for Home Healthcare Management  
Examples of Monitoring Devices and Their Applications  
Senior Citizens and Baby Boomers' Adoption of Internet Access  
Senior Citizens' and Baby Boomers' Adoption of Home Network Technology  
Telemedicine Applications' Clinical Outcomes  
Preference of Payment for In-home Care Monitoring Services  
The Federal Government's Telehealth Funding Initiatives  
Medicaid Telemedicine Reimbursement Policies  
Key Government Legislation and Regulations  
In-home Clinical Care Monitoring Service Providers  
Estimates of Current Size of In-home Care Monitoring Market  
Industry Heavyweights and Potential Entrants  
Summary of Market Drivers and Barriers  
Forecast of Demand for Digital Home Health Services in the U.S. (2005-2010)

**Resource Book**

Fundamental Changes in Care Delivery Model  
Internet Penetration of Seniors, Baby Boomers and Generations X & Y  
Type of Internet Access by Seniors, Baby Boomers and Generations X & Y  
Household Penetration of Home Networks among Different Age Groups  
Type of Home Network Technology Used by Different Age Groups  
CE Device Ownership Among Seniors, Baby Boomers and Generations X & Y  
Usage of CE Devices among Seniors, Baby Boomers and Generations X & Y  
Usage Frequency of Online Services  
Frequency of Looking up Health Related Topics on the Web by Age  
Frequency of Connecting Medical Device or Peripherals to Computer  
Appeal of Digital Home Health Services to Consumers by Age Group  
Comparison of Services Concept Appeals between Health-Conscious and Non-Health Conscious Consumers  
Gender Differences in Appeal of Digital Home Health Services  
Preference of Payment for In-home Health Monitoring Services  
Comparison of Payment Preference between Seniors and Baby Boomers  
Comparison of Payment Preference between Men and Women  
Preferred Payment Methods Crossed by Income Levels  
Reasons for Slow Adoption of IT in the Healthcare Industry  
Characteristics of Ultra-wideband (IEEE 802.15.3a)  
Features of UWB  
Medicare Demonstration Projects Using Home Monitoring Services  
State Medicaid Reimbursement Policies for Telemedicine Services

**Attributes**

**Parks Associates**  
5310 Harvest Hill Road  
Suite 235  
Lock Box 162  
Dallas TX 75230-5805

800.727.5711 toll free  
972.490.1113 phone  
972.490.1133 fax

parksassociates.com  
sales@  
parksassociates.com

Authored by: Harry Wang  
Executive Editor: Kurt Scherf  
Published by: Parks Associates

© February 2006 Parks Associates  
Dallas, Texas 75230

All rights reserved. No part of this book may be reproduced, in any form or by any means, without permission in writing from the publisher.

Printed in the United States of America.

**Disclaimer**

Parks Associates has made every reasonable effort to ensure that all information in this report is correct. We assume no responsibility for any inadvertent errors.