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Market Reports

Population Health Management & Integrated Care – EMEA, Asia and Latin America

2018 Edition

"While the concept of PHM and integrated care is not a new one, many markets outside of North America are at different maturity levels within their digital healthcare deployment. At a global level, the growing prevalence of chronic disease and rising healthcare expenditure is driving governments towards a value-based care model. However, at a national level, many markets are maturing at different rates, often choosing their own path towards implementing a value-based care model. This report aims to give a quantitative view on the emerging PHM markets, highlighting potential opportunities for vendors looking to expand into the international market."

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Signify RESEARCH

PHM & Integrated Care – EMEA, Asia and Latin America

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PHM & Integrated Care – EMEA, Asia and Latin America

Report Features

- Expert commentary on the market trends
- Primary research method ensures accuracy and reliability
- Direct access to the lead Analyst
- Highly data-centric, with numerous segmentations of the market
- Detailed analysis by application and by product to highlight growth opportunities
- Robust forecasts driven by proprietary database of hospital infrastructure
- Report focused on regions outside North America, with country analysis
- Actionable, jargon-free analyst insight and opinion

Report Content

Market metrics are presented for the period 2017 to 2022.

The market is broken by major region and country:

EMEA
- Benelux
- DACH
- Nordics
- Spain/Portugal
- Eastern Europe
- Rest of Western Europe
- Middle East and Africa
- France
- Italy
- UK/Eire

Asia
- Australia/ New Zealand
- China
- India
- Japan
- Rest of Asia

Latin America
- Brazil
- Mexico
- Rest of Latin America

At a **regional level** the market is broken down into:

Vertical
- Provider
- Payer
- Employer
- Other

Service Type & Delivery
- On Premise
- Managed Services/ SaaS
- Implementation Services
- Support Services

The market in **each country** is broken out by platform module into:

- Analytics/ Data Aggregation
- Care Management/ Coordination
- Patient Engagement

Each market metric at a **country and regional** level is presented in terms of:

- Revenues
- Lives Managed
- Average Revenue Per Life

Summary tables for each **country** are broken down into five core categories for growth:

- Top-down initiatives
- Bottoms-up initiatives
- EHR/ Health IT deployment
- Vendor Presence/ Focus
- Pilots/ Live deployment

Vendor profiles are presented for 36 PHM vendors including SWOT analysis and product overview

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Report Overview

Market

- ✓ Identify the countries, products and end-markets driving growth
- ✓ Review the legislation, market drivers and barriers for growth
- ✓ Quantitative analysis of market size and forecast growth by major country

Competition

- ✓ Analysis on the competitive landscape in major emerging markets
- ✓ Detailed profiles of 36 vendors, with SWOT analysis for each
- ✓ Identify potential partners and acquisition targets

Technology

- ✓ Analysis of each vertical by function, product and customer
- ✓ Stratification, care management/ coordination and patient engagement module development
- ✓ Review to what extent US models for PHM are being exported

Strategy

- ✓ Review of go-to-market strategies
- ✓ Analysis and insights to support your strategy planning
- ✓ Product pricing and software licensing strategies

Deliverables

Market Data

Each PHM function segmented by product, vertical, and country with 5 year forecasts.
Data presented in revenues, lives managed and revenue per life managed.

Competitive Landscape

Vendor market shares for each function category by major region.
Detailed profiles of international and local market players including SWOT analyses.

Analyst Commentary

Expert insights on country, function, and vertical trends.
Explanation of the assumptions behind the forecasts along with "Our Take" on key isues.

Report Resources

PDF report format and interactive Excel database that enables you to build your own views of the market data by selecting specific product, application and regional categories. Includes all static tables and figures.
Accompanying Powerpoint executive summary.

Research Method

Scope research with industry stakeholders
Talk with industry stakeholders to understand their information needs
Issue proposed research agenda and invite customers to take Advance Purchase option

Interview technology vendors
Evaluate supply to the market and the trends that will impact growth
Strong focus on collecting sales, shipments and pricing data

Interview healthcare providers
Conduct in-depth interviews with healthcare professionals across W. Europe and the US
Strong focus on open-ended and probing questions

Healthcare infrastructure database
Leverage Signify Research's proprietary database of key metrics on national healthcare systems
Allows for the impact of macro-economic and health infrastructure trends to be monitored

Collate secondary research
Supplement primary research with a variety of secondary research sources
Company news and financial information, economic data, conference proceedings, etc.

Review preliminary data with Advance Purchasers
Send preliminary market data to customers for review, as quality control measure
Refine market size estimates and growth forecasts based on feedback

Ongoing Analyst support
Q&A session to highlight the key findings of the research and to answer customer questions
Ongoing support to help customers stay informed of latest market developments

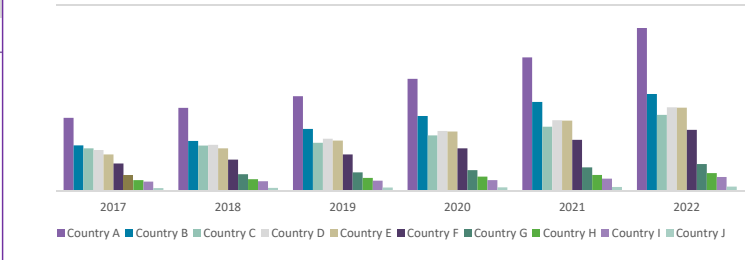
Sample Tables and Figures

Table 3.11
PHM Market by Product - Spain/Portugal

	2017	2018	2019	2020	2021	2022	CAGR (17-22)
Revenues ($m)							
Aggregation/Analytics/Stratification							
Patient Engagement							
Care Coordination/Management							
Total Market							
Annual Growth Rate							
Lives Managed (Thousands at 31st December)							
Total							
Annual Growth Rate							
Average Revenue per Life Per Month ($)							
Weighted Average Revenue							
Annual Change							

Source: Signify Research

Figure 3.1
PHM by Country - EMEA
Revenues ($m)



Source: Signify Research

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About Signify Research

At Signify Research we are passionately curious about Healthcare Technology and we strive to deliver the most robust market data and insights, to help our customers make the right strategic decisions. We blend primary data collected from in-depth interviews with technology vendors and healthcare professionals, to provide a balanced and complete view of the market trends.

Whether our research is delivered as an off-the-shelf report or as a consultancy project, our customers benefit from direct access to our Analyst team for an expert opinion when they need it. We encourage our clients to think of us as an extension to their in-house market intelligence team.

Our major coverage areas are Healthcare IT, Medical Imaging and Digital Health. In each of our coverage areas, we offer a full suite of products including Market Reports, Market Intelligence Services, as well as Custom Research and Consultancy services. Clients include technology vendors, healthcare providers and payers, management consultants and investors.

"We recently purchased one of Signify Research's reports. We felt we can trust the insights they provided to make informed strategic decisions." – Vera Borislavova, Global Customer & Market Insight Business Partner, GE Healthcare

"Signify Research's greatest strengths are its subject matter expertise and deep understanding of the industry." – Ken Sutherland, President, Toshiba Medical Visualization Systems Europe

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