

**WinterGreen Research, INC.**

**Patient Monitoring: Market Shares, Strategies, and Forecasts, Worldwide,  
2016 to 2022**

**Mountains of Opportunity**



**Picture by Susan Eustis**

WinterGreen Research, Inc.

Lexington, Massachusetts

[www.wintergreenresearch.com](http://www.wintergreenresearch.com)

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**REPORT # SH26786999**

**615 PAGES**

**365 TABLES AND FIGURES**

**2016**

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**CHECK OUT THESE KEY TOPICS**

**Patient Monitoring Supports Advanced Clinical and Home Care**

Patient Monitoring Systems Monitoring Market Driving Forces Hospital Cardiac Monitoring Vital Signs Monitors Monitoring Modular systems Transforming Health Care Landscape	Multi-Parameter Patient Monitor Wireless Patient Monitoring Hospital Cardiac Patient Monitoring Vital Signs Wrist Monitors Pulse Oximeter Monitors	Telemedicine Pulse Wave Transit Time PWTT Remote Patient Monitoring
Patient Monitoring Growth Strategy:		

**Patient Monitoring: Market Shares, Strategies, and Forecasts, Worldwide, 2016-2022**

LEXINGTON, Massachusetts (June 13, 2016) – WinterGreen Research announces that it has published a new study Patient Monitoring: Market Shares, Strategy, and Forecasts, Worldwide, 2016 to 2022. The 2016 study has 615 pages, 365 tables and figures. Worldwide Patient Monitoring markets are poised to achieve significant growth as a resurgence in tracking vital signs extends from the intensive care unit ICU and emergency department to all areas of the hospital, to patient transport venues, and to home outpatient treatment locations.

The patient monitoring platform is modular, integrating various components. Modular systems are developed in the context of consideration of probable specifications for the interaction of system components. Patient Monitoring systems are making a market resurgence because smaller, lighter, wireless units are less costly and more valuable in the context of treatment evaluations and recommendations. People who have cardiac or respiratory difficulty have more treatment options, making more extensive patient monitoring useful.

Designs take into consideration users with mild, moderate, and severe chronic disease condition restrictions. Users come from chronic disease groups and older age groups.

The core of a patient monitoring platform is an integration of separate vital signs detection sensors that form a system that supports adapting to numerous clinical requirements. Modules implement ways to determine patient condition. Market driving forces for multi-parameter and specialized vital signs patient monitors relate to more societal willingness to pay for vigilance, an increase in vigilance of sick people at risk. Cardiac and respiratory symptoms are measured as vital sign shifts by patient monitors.

Symptoms are represented by shifts in vital sign monitoring that measures disease conditions impacted deterioration of patient well-being. The monitoring is frequently done in conjunction with blood work.

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There is a lot of complexity in determining the meaning of the patient monitor vital signs measurements. Shortness of breath is a common symptom of cardiac disease. It is frequently misdiagnosed as a respiratory symptom or ignored by patients and is not even considered a symptom.

Vital signs monitoring is a way to get a window into patient condition that can provide alerts when a small change signals a possible shift in patient condition. Hospital cardiac patient monitoring technology is a vital aid in providing treatment for severely ill patients.

Alerts can be used to take action before a patient gets even more seriously ill. Hospital and outpatient cardiac patient monitoring can detect arrhythmias and get people to treatment faster before it is too late to correct heart failure. Early detection of a problem in the home is a way to avoid a hospital stay. Appropriate treatment of chronic conditions is difficult and is essential to helping people protect quality of life after recovery from a serious illness.

According to Susan Eustis, lead author of the study, "Revitalization of patient monitor markets is occurring because units are smaller, less costly, and more useful across a variety of venues. Patient monitoring is moving toward the ability to help with wellness and to participate in the wearables markets." As people shift resource toward medical treatment, patient monitoring equipment becomes a priority.

Lifestyle is supported by patient monitoring products that support earlier detection of disease conditions. Increasing market share has been achieved by providing value to the clinicians. The technical expertise of the sales force, the effectiveness of the distribution system, the strength of the dealers, and the availability of prompt and reliable service for products when addressed are able to help patient monitor vendors achieve competitive advantage.

Patient monitor markets at \$11 billion in 2015 are anticipated to reach \$26.2 billion by 2022. Strong growth is predicated on the increasing reliance on multi-parameter patient monitors in every bed of the hospital, in multiple areas of specialized clinics, and in many rehab centers.

Market growth occurs with the expansion of multi-parameter patient monitors connected to a central station beyond the intensive care unit to all floors of a hospital. Clinical care depends on monitoring. Vital signs monitors transmit data wirelessly directly to the electronic patient record, generating alerts if data is outside preset parameters. Patient monitors are expanding the use base in the hospital and expanding use in rehab centers, clinical settings, and home.

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. It conducts its business with integrity.

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WinterGreen Research supports various market segment programs; provides trusted technical services to the marketing departments. It carries out accurate market share and forecast analysis services for a range of commercial and government customers globally. These are all vital market research support solutions requiring trust and integrity.

Key Words: Patient Monitoring Systems, Monitoring Market Driving Forces, Hospital Cardiac Monitoring, Vital Signs Monitors, Monitoring Modular systems, Transforming Health Care Landscape, Multi-Parameter Patient Monitor, Wireless Patient Monitoring, Hospital Cardiac Patient Monitoring, Vital Signs, Wrist Monitors, Pulse Oximeter Monitors, Telemedicine, Pulse Wave Transit Time PWTT, Remote Patient Monitoring,

## Companies Profiled

### Market Leaders

Philips  
General Electric (GE)  
Drager  
Nihon Kohden  
Fukuda Denshi  
Hill-Rom / Welch Allyn  
Mindray Medical  
OSI / Spacelabs  
Viterion  
Maquet  
Penlon  
Criticare Systems  
Medtronic  
Biotronic  
Care Innovations  
Sotera  
Mortara Instrument

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## Market Participants

Abbott Labs	eCaring	Opto Circuits
Alten Calsoft Labs	Getinge Group / Maquet	BPL Group / Penlon
AMD Global Telemedicine	Guangdong Biolight Meditech Co., Ltd.	Qualcomm Incorporated
American Telecare	HealthSense	Roche
Boston Scientific	Honeywell	Schiller
BPL Group / Penlon	Infinium	Sotera Wireless
Cardiocom	LifeWatch	Smiths Medical
CardioNet	Medtronic	St. Jude Medical
Care Innovations	NSD / Viterion	Vitaphone
Criticare Technologies		

## Patient Monitoring: Market Shares, Strategies, and Forecasts, Worldwide, 2016 to 2022

### Report Methodology

This is the 678th report in a series of primary market research reports that provide forecasts in communications, telecommunications, the Internet, computer, software, telephone equipment, health equipment, and energy. Automated process and significant growth potential are a priority in topic selection. The project leaders take direct responsibility for writing and preparing each report. They have significant experience preparing industry studies. They are supported by a team, each person with specific research tasks and proprietary automated process database analytics. Forecasts are based on primary research and proprietary data bases.

The primary research is conducted by talking to customers, distributors and companies. The survey data is not enough to make accurate assessment of market size, so WinterGreen Research looks at the value of shipments and the average price to achieve market assessments. Our track record in achieving accuracy is unsurpassed in the industry. We are known for being able to develop accurate market shares and projections. This is our specialty.

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The analyst process is concentrated on getting good market numbers. This process involves looking at the markets from several different perspectives, including vendor shipments. The interview process is an essential aspect as well. We do have a lot of granular analysis of the different shipments by vendor in the study and addenda prepared after the study was published if that is appropriate.

Forecasts reflect analysis of the market trends in the segment and related segments. Unit and dollar shipments are analyzed through consideration of dollar volume of each market participant in the segment. Installed base analysis and unit analysis is based on interviews and an information search. Market share analysis includes conversations with key customers of products, industry segment leaders, marketing directors, distributors, leading market participants, opinion leaders, and companies seeking to develop measurable market share.

Over 200 in depth interviews are conducted for each report with a broad range of key participants and industry leaders in the market segment. We establish accurate market forecasts based on economic and market conditions as a base. Use input/output ratios, flow charts, and other economic methods to quantify data. Use in-house analysts who meet stringent quality standards.

Interviewing key industry participants, experts and end-users is a central part of the study. Our research includes access to large proprietary databases. Literature search includes analysis of trade publications, government reports, and corporate literature.

Findings and conclusions of this report are based on information gathered from industry sources, including manufacturers, distributors, partners, opinion leaders, and users. Interview data was combined with information gathered through an extensive review of internet and printed sources such as trade publications, trade associations, company literature, and online databases. The projections contained in this report are checked from top down and bottom up analysis to be sure there is congruence from that perspective.

The base year for analysis and projection is 2011. With 2011 and several years prior to that as a baseline, market projections were developed for 2012 through 2022. These projections are based on a combination of a consensus among the opinion leader contacts interviewed combined with understanding of the key market drivers and their impact from a historical and analytical perspective.

The analytical methodologies used to generate the market estimates are based on penetration analyses, similar market analyses, and delta calculations to supplement independent and dependent variable analysis. All analyses are displaying selected descriptions of products and services.

This research includes referencde to an ROI model that is part of a series that provides IT systems financial planners access to information that supports analysis of all the numbers that impact management of a product launch or large and complex data center. The methodology used in the models relates to having a sophisticated analytical technique for understanding the impact of workload on processor consumption and cost.

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WinterGreen Research has looked at the metrics and independent research to develop assumptions that reflect the actual anticipated usage and cost of systems. Comparative analyses reflect the input of these values into models. The variables and assumptions provided in the market research study and the ROI models are based on extensive experience in providing research to large enterprise organizations and data centers. The ROI models have lists of servers from different manufacturers, Systems z models from IBM, and labor costs by category around the world. This information has been developed from WinterGreen research proprietary data bases constructed as a result of preparing market research studies that address the software, energy, healthcare, telecommunications, and hardware businesses.

## YOU MUST HAVE THIS STUDY

### Patient Monitors: Market Shares, Strategy, and Forecasts, 2016 to 2022

#### Table of Contents

##### Patient Monitoring: Executive Summary

The study is designed to give a comprehensive overview of the Patient Monitoring equipment market segment. Research represents a selection from the mountains of data available of the most relevant and cogent market materials, with selections made by the most senior analysts. Commentary on every aspect of the market from independent analysts creates an independent perspective in the evaluation of the market. In this manner the study presents a comprehensive overview of what is going on in this market, assisting managers with designing market strategies likely to succeed.

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## About The Company

WinterGreen Research, research strategy relates to identifying market trends through reading and interviewing opinion leaders. By using analysis of published materials, interview material, private research, detailed research, social network materials, blogs, and electronic analytics, the market size, shares, and trends are identified. Analysis of the published materials and interviews permits WinterGreen Research senior analysts to learn a lot more about markets. Discovering, tracking, and thinking about market trends is a high priority at WinterGreen Research. As with all research, the value proposition for competitive analysis comes from intellectual input.

WinterGreen Research, founded in 1985, provides strategic market assessments in telecommunications, communications equipment, health care, Software, Internet, Energy Generation, Energy Storage, Renewable energy, and advanced computer technology. Industry reports focus on opportunities that expand existing markets or develop major new markets. The reports access new product and service positioning strategies, new and evolving technologies, and technological impact on products, services, and markets. Innovation that drives markets is explored. Market shares are provided. Leading market participants are profiled, and their marketing strategies, acquisitions, and strategic alliances are discussed. The principals of WinterGreen Research have been involved in analysis and forecasting of international business opportunities in telecommunications and advanced computer technology markets for over 30 years.

The studies provide primary analytical insight about the market participants. By publishing material relevant to the positioning of each company, readers can look at the basis for analysis. By providing descriptions of each major participant in the market, the reader is not dependent on analyst assumptions, the information backing the assumptions is provided, permitting readers to examine the basis for the conclusions.

WinterGreen Research is positioned to help customers facing challenges that define the modern enterprises. The increasingly global nature of science, technology and engineering is a reflection of the implementation of the globally integrated enterprise. Customers trust wintergreen research to work alongside them to ensure the success of the participation in a particular market segment.

WinterGreen Research supports various market segment programs; provides trusted technical services to the marketing departments. It carries out accurate market share and forecast analysis services for a range of commercial and government customers globally. These are all vital market research support solutions requiring trust and integrity.

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