

iPHR Market Report

Analysis & Trends of
Internet-based Personal Health Records' Market

About Chilmark Research

Chilmark Research is a global research and advisory firm focusing on consumer-facing, healthcare IT solutions. Our focus provides clients with in-depth, research on critical market trends driving the technology convergence and adoption of among others: Web-based health communities, Personal Health Records (PHRs), self-directed genetics testing, health monitoring via sensor networks and telehealth services.

Using a pragmatic, evidence-based research methodology, with a strong emphasis on primary research, Chilmark Research structures its research reports to serve adopters, investors and developers of these technologies. In addition to these research reports, Chilmark Research also assists clients through a variety of services including: vendor assessment and deployment strategies, case studies, best practices and market trend analysis.

The information in this report is proprietary to and copyrighted by Chilmark Research. No part of this report may be reproduced or distributed without prior permission of Chilmark Research. The information contained within the report is not intended as a solicitation of an offer to buy or sell any investment or other specific product. All information and opinions expressed in this report were obtained from sources believed to be reliable and in good faith. No representations or warranty expressed or implied is made as to its accuracy or completeness.

Preface

By: John Moore, Founder & Managing Director, Chilmark Research

Quite suddenly, the Personal Health Record (PHR) market has taken on renewed interest. Countless press articles extol both the virtues and risks of PHRs. Government institutions are dedicating resources to understand how PHRs may affect the healthcare sector – driving needed change. Employers and health plans seek new ways of using PHRs to engage their constituents, encouraging them to adopt healthy behaviors. Providers are adopting PHR solutions to deliver added value to their customers and increase customer retention.

Against this back-drop, within the last year the PHR market has seen the entrance of two of the largest and arguably most significant consumer-driven software companies in the world, Google and Microsoft, who are each pursuing their own consumer-focused, personal healthcare strategies. Even the employer-led consortium, Dossia is back on track developing a personal healthcare platform with Children's Hospital of Boston that when complete may serve upwards of 8 million consumers.

Further, it is becoming increasingly clear that the U.S. healthcare market is in need of some serious restructuring. While PHRs are no panacea for the healthcare challenges this country faces, they have the potential to initiate change that is long overdue, change that will be consumer led and consumer driven.

Yet, despite this interest, a clear, pressing need, and the entrance of major players, the PHR market remains an elusive, challenging market to understand and predict its future outcome. A multitude of companies, large and small, have developed an equally broad array of PHR solutions. Some solutions reside on a consumer's desktop, others come on a USB and still others are offered over the Web. Beyond modalities, the capabilities of these solutions are even more wide ranging, from simplistic systems for filing of electronic records to sophisticated solutions with personalization tools that guide the user on not only how to manage their health and the health of loved ones, but, for example, provide advice on who may be the best physician in their area for a given ailment and the costs of treatment.

Over the last several months, Chilmark Research has interviewed a wide range of PHR vendors, users, employers, proponents, detractors and observers. One observation became readily apparent in these discussions, the future of the PHR market lies on the Web. Therefore, unlike other reports on this market, the focus of this report is strictly on Web-based PHR applications, that are referred to as iPHR solutions.

First in a series of reports, this report is designed to bring clarity to the reader on where the iPHR market is today, where it is headed and the adoption challenges that need to be overcome. Most importantly, the report will assist the reader in understanding who are the leading iPHR vendors today, what is their unique value proposition and areas they need to improve. Armed with this information the reader will have the knowledge necessary to initiate their own evaluation and selection of an iPHR solution that meets their personal needs or the needs of the organization they represent.

Table of Contents

Chapter 1: Executive Summary

INTRODUCTION	1-1
Definition of iPHR	1-1
Methodology & Scope	1-2
B2C is Out, B2B is In	1-3
Employers	1-4
Health Plans	1-4
Providers	1-5
Consumers	1-6
iPHR Vendor Profiles	1-7
Overall Leaders	1-7
LOOKING FORWARD	1-8
Opportunities	1-8
Market Demand	1-8
Visibility, Education, & Clarity	1-9
Technology	1-9
Challenges	1-9
Data Liquidity	1-9
Privacy & Security	1-10
Customer Apathy	1-11
Farther Into the Future	1-11
Dominance of PHS	1-12
Confluence	1-12
Fragmentation	1-12
RECOMMENDATIONS	1-13
Personal	1-13
Actionable	1-13
Connected	1-13
Secure	1-14

Chapter 2: The Market – Past, Present and Future

INTRODUCTION	2-1
Definition of iPHR	2-1
PAST	2-1
Target: End Consumer (B2C)	2-1
Common Attributes & Adoption Challenges of Early iPHRs	2-2
PRESENT	2-2
Target: Businesses	2-3
Employers	2-4
Health Plans	2-7
Providers	2-10
Consumers	2-12
Others	2-15
Standards	2-16
Interoperability	2-17
Privacy & Security	2-18
Security	2-18
Privacy	2-19
Functional Models	2-20
Near-term Challenges	2-20
Data Liquidity	2-21
Trust	2-21

Consumer Apathy	2-22
Near-term Opportunities	2-23
Market Demand	2-23
Visibility, Education & Clarity	2-24
Technology	2-24

FUTURE 2-24

Dominance of PHS	2-25
Confluence	2-26
Fragmentation	2-26

RECOMMENDATIONS 2-28

Buyers	2-28
End Users	2-29
Vendors	2-29

Chapter 3: iPHR Vendor Profiles

INTRODUCTION 3-1

Methodology	3-1
Profile Guide	3-2
Profile Leaders	3-3
Overall	3-3
Product	3-3
Marketing	3-4
Domain	3-5
Best-in-Class	3-5

PROFILES

ActiveHealth	3-8
CapMed	3-10
FollowMe	3-12
Google Health	3-14
HealthAtoZ	3-16
HealthString	3-18
HealthTrio	3-20
ICW-Global	3-32
iMetrikus	3-34
LAXOR	3-36
Medem	3-38
MediKeeper	3-40
MyMedicalRecords	3-42
NoMoreClipboard	3-44
PDHI	3-46
RelayHealth	3-48
RevolutionHealth	3-50
SimplyWell	3-52
VitalChart	3-54
WebMD	3-56

APPENDICES

APPENDIX A: A-1

Acronyms Used	A-1
---------------	-----

APPENDIX B:

Additional Resources	A-2
----------------------	-----