

# Telehealth Market in US - Industry Outlook and Forecast 2020-2025

<https://marketpublishers.com/r/TFD272238F7EN.html>

Date: April 2020

Pages: 241

Price: US\$ 3,500.00 (Single User License)

ID: TFD272238F7EN

## Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this US Telehealth Market Report

The US telehealth market is expected to grow at a CAGR of over 29% during the period 2019–2025.

Since the outbreak of the COVID-19 pandemic in the US, the telehealth platform has emerged as a major tool to fight and contain the virus. Telehealth services have helped to ease the burden on traditional healthcare systems by encouraging patients with other disorders and mild or moderate ailments to treat via web-based or cloud-based applications. Due to the rise in the COVID-19 pandemic, the US telehealth market is expected to witness over 80% YOY growth in 2020. To deal with the pandemic, health service providers in the US are utilizing telehealth services that connect doctors and patients remotely. As federal governments have recently implemented the social distancing and nationwide lockdown as a preventive measure to contain the pandemic from spreading, these services have become an effective tool for healthcare management. Hence, the rise in contagious and viral infection is expected to support market growth in the US.

With the rapid advancement in technology, telehealth is considered as the future of medicine. Rural areas, war-torn regions, and areas affected by natural calamities require and can benefit from remote healthcare services. The development of the telecommunication system has increased the scope of remote healthcare services immensely. With the introduction of e-health services, the growth of traditional medical diagnosis is growing at a moderate rate.

The following factors are likely to contribute to the growth of the US telehealth market during the forecast period:

Expansion of Reimbursement for Telehealth Services

Emergence of Telehealth Robots and Robotic Platforms

Demand for Telehealth Services due to COVID-19 Pandemic Crisis

Increasing Number of mHealth Applications fueling Telehealth Adoption

The study considers the present scenario of the US telehealth market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The study offers both the demand and supply aspect of the market. It profiles and examines leading companies and other prominent ones operating in the market.

## US TELEHEALTH MARKET – SEGMENTATION

This research report includes a detailed segmentation by modality, component, delivery mode, and end-user. The growing incidence of chronic diseases such as heart ailments and stroke has impacted the growth of the real-time virtual health segment. The segment is expected to grow with increased adoption of telemedicine, coupled with advances in technology and high penetration of smart gadgets in the US. Some health systems are integrating real-time virtual healthcare with real-time audio/video telemedicine consultation, chat consultation into primary care practices as a complement to existing modes of care. Several healthcare providers in the US have altered the mode of their services to improve information continuity and provide easy access to appropriate care for patients through initiatives such as electronic messaging or chat with the care team, and a comprehensive patient portal to conduct audio/video calls. While the video segment is growing at a faster rate, the audio communication segment is expected to grow at a slow rate as the preference for video visits is growing.

The telehealth services segment is growing at the fastest CAGR as the demand for these services is increasing across the US. These services require to conduct and process virtual visits, online consultations of patients, interact with other healthcare professionals, and monitor patients on a real-time basis. This segment provides end-to-end telehealth solutions offered by telehealth companies to healthcare providers such

as hospitals, clinics, and home care settings.

The increasing prevalence of chronic diseases, the growing demand for wearable and connected medical devices and remote patient monitoring systems, the rising elderly population, the increasing number of product approvals and technological advances, and the increasing awareness of technologically advanced connected medical devices are driving the growth of the hardware segment. The software segment mainly includes medical applications for smartphones and tablets and software/mobile solutions for data management in telehealth centers. The segment plays a critical role in delivering valuable data to physicians and aid in accurate clinical decision making for diagnosis, monitoring, and treatment. The market is growing at a relatively slower rate than the other two segments.

The web/app-based telehealth segment accounts for the largest share in the US telehealth market. As the web-based delivery model requires minimal software and hardware components for delivering advanced telehealth solutions, the demand is relatively high since it reduces upfront installation costs. Hence, the market is witnessing the increased adoption of web-based services by healthcare providers. This segment is expected to grow at a healthy rate, especially from emerging economies that are embracing telehealth technology in most healthcare facilities to provide access to services in remote and rural areas.

With the burden of the aging population and chronic diseases growing across the globe, having a digital health strategy in place has become more vital than before for healthcare providers and payers. The implementation of next-generation technology such as cloud-based telehealth is taking precedence as healthcare providers seek to manage the influx of patients, health information, and expectations for the more consumer-friendly experience. The segment is poised for growth with the increased deployment of telemedicine, remote monitoring tools, and mHealth applications.

Several hospitals offer telehealth services for diagnosis, intervention, and treatment of a broad range of diseases. Large hospitals help in diagnosing and monitoring medical conditions by offering specialized services through highly qualified and large workforce. As the demand for telemedicine services and remote patient monitoring devices is increasing, hospitals are focusing on enhancing the infrastructure to meet the growing demand for such services. The availability of remote monitoring, mHealth, and virtual health tools is key for providing value-based healthcare. About 40% of US hospitals have emphasized the importance of health IT and mHealth devices and applications to improve the quality of patient care. Hospitals are highlighting the importance of

telehealth and showcasing their achievement of providing high-quality care after they implemented virtual platforms. Further, increased collaborations between hospitals and vendors are expected to serve as beneficial in increasing the adoption of tele-ICUs in the remote healthcare market.

Patients & individuals are the second-largest contributors to the US telehealth market. The general public perception of treatment methods has changed drastically over the last few years. Patients are prioritizing self-care and homecare treatment options as they are convenient and save a significant amount of time and costs. Service providers have options to communicate with patients, recommend a treatment plan, and send the prescription to the patient's registered pharmacy with telehealth platforms. Vendors are partnering with healthcare IT companies to bring advanced IT solutions for DTC telehealth end-users. Such strategies and collaborations will have a positive impact on the market growth of the US telehealth market. Vendors are also offering advanced mobile applications and software development kits (SDKs), thereby encouraging patients to opt for DTC services.

#### Market Segmentation by Modality

- Real-time Virtual Health

- Remote Patient Monitoring

- Store and Forward

#### Market Segmentation by Component

- Service

- Hardware

- Software

#### Market Segmentation by Delivery Mode

- Web/Application-based

Cloud-based

On-premise

#### Market Segmentation by End-user

Healthcare Providers

Patients & Individuals

Employees & Government Organizations

Payers

#### INSIGHTS BY VENDORS

The US telehealth market is highly dynamic and fragmented, with the presence of several medical device manufacturers, software/application providers, and telehealth service providers. Medical device manufacturers are collaborating with software/application developers and service providers to enhance the quality of care to patients. The rapidly changing technological environment has a significant impact on the overall market as patients and clinicians are looking for remote healthcare platforms with innovative and advanced features.

#### Key Vendors

AMD Global Telemedicine

American Well

BioTelemetry

GlobalMedia Group

Koninklijke Philips

Resideo Life Care Solutions

Medtronic

Teladoc Health

#### Other Prominent Vendors

InTouch Health

AirStrip Technologies

INOVA

A&D Company

Abbott

AgaMatrix

AliveCor

AT&T

athenahealth

BIOTRONIK

Boston Scientific

Biotricity

CHI Health

edgeMED Healthcare

eVisit

GE Healthcare

Graham Healthcare Group

Harris Computer

iHealth Labs

Integrity Urgent Care

iSelectMD

Masimo

MDLIVE

Medici

MeMD

Mercy Virtual

NextGen Healthcare

Omron Healthcare

PlushCare

MedXCom

SOC Telemed

THA Group

Vidyo

Vsee

virtuwell

Spacelabs Healthcare

ZIPNOSIS

## KEY MARKET INSIGHTS

The analysis of the US telehealth market provides sizing and growth opportunities for the period 2020–2025.

Offers sizing and growth prospects of the US telehealth market for the forecast period 2020–2025.

Provides comprehensive insights on the latest industry trends, forecast, and growth drivers in the US telehealth market.

Includes a detailed analysis of growth drivers, challenges, and investment opportunities.

Delivers a complete overview of segments and the regional outlook of the US telehealth market.

Offers an exhaustive summary of the vendor landscape, competitive analysis, and key strategies to gain a competitive advantage.



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