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Telehealth & Telemedicine Market by Function (Teleconsultation, RPM, Diagnostics & Treatment, Analytics, Administrative), Application (TelelCU, Teleradiology, Telecardiology, Diabetes), End User (Hospital, ASC, Payer), & Region - Global Forecast to 2030

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Abstracts

The telehealth and telemdicine market is projected to reach USD 180.86 billion by 2030 from USD 94.14 billion in 2024, at a CAGR of 11.5% from 2024 to 2030. The telehealth and telemedicine market is rapidly expanding due to a variety of factors such as advancement in telecommunication technologies, government support and regulatory policies, and expansion of remote patient moniytoring systems. An aging population necessitates continuous monitoring of chronic conditions, creating a growing demand for cost-effective healthcare solutions. Furthermore, the rising prevalence of chronic diseases, such as diabetes and cardiovascular disease, emphasizes the value of remote care. Telemedicine saves a lot of time and money, hence becoming attractive for both patients and providers. The advancements in the field of telecommunications technology along with the increasing adoption of remote patient monitored technologies have enhanced the virtual care success rate and market adoption, while government support through favorable regulation and reimbursable frameworks has helped in market expansion.

“Patients segment had the fastest growth rate in the telehealth & telemedicine market during the forecast period, by end user.”

By end user, the patients segment is the fastest growing segment in the telehealth and telemedicine market during the forecast period. This is mainly due to the growing

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adoption of remote healthcare services, which enable patients to receive medical consultations and treatment from the comfort of their own homes. The factors that have contributed to the increase include growing chronic conditions, the need for convenient and timely medical care, and the increasing awareness of the benefits of telemedicine. The COVID-19 pandemic had also been an accelerator of telehealth, with patients seeking safer alternatives to in-person visits. Other factors that are driving this market segment include enhanced patient comfort, reduced healthcare costs, and improved access to specialists, especially in rural or underserved areas.

“By component, software segment to accounted for the largest market share in the telehealth and telemedicine market.”

Based on component, the software segment accounted for the largest market share in the telehealth and telemedicine market. This is due to the increase in the use of telehealth platforms for virtual consultation, remote patient monitoring, and electronic health record management. With use of digital resources by healthcare providers becoming widespread in delivering care in an efficient manner, software for video conferencing, appointment scheduling, secure messaging and data analytics, are fast becoming critical. The integration of artificial intelligence (AI) and machine learning in telemedicine application software also is accelerateing market expansion, providing enhanced diagnostic capabilities, tailored clinical management, and better outcomes for the patient. Moreover, the rising focus on seamless interoperability between healthcare systems and regulatory compliance for data security and privacy further accelerates the demand for advanced telehealth software.

“Asia Pacific is estimated to register the fastest CAGR over the forecast period.”

The telehealth & telemdicine market is geographically segmented into North America, Europe, Asia Pacific, Latin America, and Middle East & Africa. The Asia Pacific telehealth & telemdicine market is projected to register fastest CAGR during the forecast period. The Asia Pacific is benefiting from the fast-developing healthcare infrastructure, advances in digital technologies. It is due to multiple factors such as the rising use of digital healthcare products, healthcare needs resulting from large and ageing populations, as well as an increasing incidence of chronic diseases. Moreover, internet penetration and mobile penetration have broadened in areas such as India and China, which in turn have accelerated the growth in telehealth services. Government activities promoting telemedicine and improvements in digital health infrastructure also play a role in contributing to the growth of telehealth and telemedicine market.

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Breakdown of supply-side primary interviews by company type, designation, and region:

By Company Type: Tier 1 (40%), Tier 2 (35%), and Tier 3 (25%)

By Designation: Managers (40%), Directors (35%), and Others (25%)

By Region: North America (45%), Europe (30%), Asia Pacific (20%), Latin America (3%) and Middle East & Africa (2%)

List of Companies Profiled in the Report:

1. Koninklijke Philips N.V. (Netherlands)
2. Medtronic (Ireland)
3. GE Healthcare (US)
4. Epic Systems Corporation (US)
5. Oracle (US)
6. Doximity, Inc. (US)
7. Teladoc Health, Inc. (US)
8. American Well (US)
9. Siemens Healthineers AG (Germany)
10. Cisco Systems Inc. (US)
11. Included Health, Inc. (Doctor on Demand, Inc.) (US)
12. AMC Health (US)
13. TeleSpecialists (US)
14. Walgreen Co. (US)
15. Caregility (US)
16. CVS Health (US)
17. EverNorth Health, Inc. (US)
18. Elation (US)
19. Iron Bow Healthcare Solutions (US)
20. ZoomCommunications, Inc. (US)
21. Timedoc Health (US)
22. Cerebral Inc. (US)
23. Kindbody (US)
24. Transcarent (US)
25. Caresimple, Inc. (US)

Research Coverage:

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This research report categorizes the telehealth & telemedicine market by component (Hardware (Telehealth Kits, Carts, And Stations, Patient Monitoring Devices (Cardiac Monitoring Devices, Neurological Monitoring Devices, Respiratory Monitoring Devices, Blood Glucose Monitoring Devices, Fetal & Neonatal Monitoring Devices, Weight Monitoring Devices, Multiparameter Monitoring Devices, Pulse Oximeter Devices, Other Monitoring Devices)), Software (By Modality: EHR Centric, Non-EHR Centric, By Integration Type: Integrated Software, Standalone Software, By Type: Remote Patient Monitoring, Virtual Care Platforms (Real-Time Interaction, Store & Forward), Video Conferencing platforms, Virtual sitting & Nursing, By Deployment: On-premise model, Cloud-based model), and Services). By Function (Clinical Care Management (Including Teleconsultation & Follow-Up), Preventive Care Management, Diagnostics & Treatment, Remote Patient Monitoring/Patient Monitoring, Rehabilitation & Recovery, Administrative, Analytics & Reporting, Patient Engagement, Other Functions (Clinical Trials, Education, Training, and Others), By Application (Primary Care, Speciality Care (Teleradiology, Telecardiology, Teleneurology, Diabetes, Respiratory Disorders (COPD, Asthma, And Others), Hypertension, Teledermatology, Telestroke, Telepsychiatry (Mental Health), Others (Dental, Oncology, Obstetrics, Gynaecology, Ophthalmology, Metabolic Disorders, Immunology, Gastroenterology, Nephrology & Urology, Rare Disease, Infectious Diseases, And Others), TeleICU, Virtual Sitting & Nursing, Other Applications (Clinical Trials, Emergency & Urgent Care, General Wellness & Lifestyle Improvement, Occupational Health, and Others), By Age Group (Pediatrics, Adults, Geriatrics), By End User (Healthcare Providers (Hospitals, Ambulatory Surgical Centers, Ambulatory Care Centers, and Other Outpatient Settings, Long Term Care & Assisted Living Facilities, Home Healthcare, Other Healthcare Providers (Diagnostics & Imagining Centers, Rehabilitation Centers, Behavioural Health Centers, and Others), Healthcare Payers (Public Payers, Private Payers), Patients, Pharmaceutical & Biotechnology Companies, Medtech Companies, Other End Users (Medtech Companies, Academic Institutes, Research Centers, Government Organizations, and Others)) and region. The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the telehealth & telemedicine market. A thorough analysis of the key industry players has been done to provide insights into their business overview, offerings, and key strategies such as acquisitions, collaborations, partnerships, mergers, product/service launches & enhancements, and approvals in the telehealth & telemedicine market. Competitive analysis of upcoming startups in the telehealth & telemedicine market ecosystem is covered in this report.

Reasons to Buy the Report

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The report will help market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall telehealth & telemedicine market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers: (Growing geriatric population and increasing need to expand healthcare access, Rising prevalence of chronic conditions, Demonstrated Time and Cost Savings, Advancements in telecommunication technologies, Shortage of skilled healthcare professionals, Government support & Regulatory policies, Expansion of Remote Patient Monitoring (RPM) systems), restraints (High investment costs and lack of IT expertise, Regulatory variations across regions, Behavioral reluctance to adopt new technologies, Rise in fraud and abuse within healthcare systems, Patient privacy and confidentiality, adhering to medical ethics), opportunities (Growing use of wearables, apps, and sensors for virtual care, Emergence of AI/ML, Increasing shift towards outpatient care models, High utility of telemedicine against infectious diseases and epidemics, Expansion of hospital-at-home initiatives, Demand for EMR-based telehealth, Rapid growth of mental health care), and challenges (Data security concerns, Limited data accessibility, Inability to maintain hygiene and cleanliness standards) influencing the growth of the telehealth & telemedicine market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the telehealth & telemedicine market.

Market Development: Comprehensive information about lucrative markets – the report analyses the telehealth & telemedicine market across varied regions.

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the telehealth & telemedicine market.

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Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players such as Koninklijke Philips N.V. (Netherlands), Medtronic (Ireland), GE Healthcare (US), Epic Systems Corporation (US), Oracle (US), Doximity, Inc. (US), Teladoc Health, Inc. (US), etc. among others in telehealth & telemedicine market.

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About

The global Telehealth Market was valued at $2.2 Billion in 2015 and is poised to grow at a CAGR of 24.2% to reach $6.5 Billion by 2020.

Major players in the global Telehealth market are

Cerner Corporation (U.S.)

Honeywell Life Care Solutions (U.S.)

McKesson Corporation (U.S.)

Medtronic, Inc. (U.S.)

Robert Bosch Healthcare (U.S.)

Cisco Systems, Inc. (U.S.)

The major factors driving the growth of the telehealth solutions market are the rise in the aging and chronically ill population, the shortage of physicians in the U.S., uneven physician distribution worldwide, improvement in telecommunication infrastructure, technological advancements, rising healthcare costs, and awareness on the benefits of tele-health. However, certain barriers, such as limited reimbursement in the U.S. and legality, privacy, and security concerns worldwide, are restraining the growth of this market.

In 2015, the North American market is expected to command the largest share of the global market, followed by Europe and Asia-Pacific. Asia-Pacific is the fastest-growing region in this market. The rapidly growing healthcare industry in India, increasing number of HCIT programs, the rising prevalence of chronic diseases in Australia, and increasing funding for telehealth in Australia will drive the growth of this market in Asia.

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