

# **Neurofeedback-as-a-Service Market Forecasts to 2034 – Global Analysis By Service Model (Subscription-Based Platforms, Pay-Per-Session Services, Enterprise Licensing Models, Remote Neurofeedback Services, Clinician-Managed Service Platforms and Direct-to-Consumer Services), Modality, Distribution Channel, Application and Geography**

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## **Abstracts**

According to Statistics MRC, the Global Neurofeedback-as-a-Service Market is accounted for \$1.5 billion in 2026 and is expected to reach \$2.2 billion by 2034 growing at a CAGR of 4.9% during the forecast period. Neurofeedback as a Service is a modern way for people to monitor and train their brain activity using cloud based technology. Instead of visiting a specialized clinic, users wear a comfortable headband that tracks neural signals and sends the data to an app. The service provides real time cues, like sounds or visuals, to help the brain learn how to reach calmer or more focused states. It makes high tech mental wellness accessible to everyone, allowing individuals to reduce stress and improve performance from their own homes.

### **Market Dynamics:**

Driver:

Demand for non-pharmacological mental health

The demand for non-pharmacological mental health solutions is a primary growth driver for the neurofeedback-as-a-service market, as patients and providers seek alternatives to medication-based therapies. Driven by rising awareness of side effects associated

with long-term pharmacological use, neurofeedback is gaining acceptance for anxiety, ADHD, and mood disorders. Moreover, increasing focus on holistic and brain-based wellness approaches supports adoption. Consequently, service providers are expanding accessible, data-driven neurofeedback platforms.

#### Restraint:

##### High equipment and therapy costs

The high equipment and therapy costs represent a significant restraint, particularly for individual users and smaller clinics. Due to specialized EEG hardware, software licensing, and professional supervision requirements, initial investment levels remain elevated. Additionally, recurring service and maintenance expenses further increase total cost of ownership. As a result, adoption may be constrained in price-sensitive markets. Nevertheless, subscription models and hardware cost reductions are gradually improving affordability.

#### Opportunity:

##### Remote telehealth neurofeedback expansion

The remote telehealth neurofeedback expansion presents a strong market opportunity, enabling scalable delivery of brain training services. Fueled by growing acceptance of virtual mental health care, cloud-based neurofeedback platforms allow remote monitoring and therapy personalization. Furthermore, integration with wearable EEG devices enhances user convenience. In turn, expanding broadband access and digital health reimbursement policies are accelerating remote service adoption. Therefore, tele-neurofeedback is expected to drive sustained market growth.

#### Threat:

##### Regulatory approval and compliance hurdles

The regulatory approval and compliance hurdles pose a notable threat, as neurofeedback services often intersect medical device and digital health regulations. As requirements vary across regions, providers face complex certification and data governance obligations. Moreover, lengthy approval timelines can delay market entry. Consequently, compliance costs may limit innovation velocity. However, clearer regulatory pathways for digital therapeutics could gradually reduce approval friction.

**Covid-19 Impact:**

The COVID-19 pandemic had a structurally positive impact on the neurofeedback-as-a-service market. Initially, mental health stressors surged, increasing demand for accessible therapeutic solutions. Subsequently, restrictions on in-person therapy accelerated adoption of remote neurofeedback platforms. Furthermore, normalization of telehealth reinforced subscription-based care models. As a result, post-pandemic mental health strategies increasingly incorporate neurofeedback as a scalable digital service.

The Subscription-Based Platforms segment is expected to be the largest during the forecast period

The Subscription-Based Platforms segment is expected to account for the largest market share during the forecast period, due to predictable pricing and continuous service access. Supported by recurring revenue models and software updates, subscriptions appeal to both providers and end users. Additionally, bundled analytics and personalized training plans enhance engagement. Therefore, subscription-based neurofeedback platforms continue to dominate service delivery models within the market.

The EEG-based neurofeedback segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the EEG-based neurofeedback segment is predicted to witness the highest growth rate, driven by advancements in wearable brain-monitoring technologies. Enabled by improved signal accuracy and AI-assisted interpretation, EEG-based services offer effective real-time feedback. Moreover, compatibility with home-based therapy supports rapid adoption. Consequently, growing demand for personalized and non-invasive mental health solutions is accelerating segment growth.

**Region with largest share:**

During the forecast period, the North America region is expected to hold the largest market share, owing to advanced mental healthcare infrastructure and early digital therapeutics adoption. Anchored by high awareness of neurofeedback therapies and favorable reimbursement trends, regional demand remains strong. Additionally, presence of leading service providers supports innovation. As a result, North America

continues to lead global revenue generation.

### **Region with highest CAGR:**

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, fueled by rising mental health awareness and rapid digital health adoption. Driven by expanding telehealth infrastructure and large untreated populations, demand for neurofeedback services is accelerating. Furthermore, smartphone penetration and wellness-focused consumer behavior support market entry. Therefore, Asia-Pacific represents a high-growth frontier for neurofeedback-as-a-service providers.

### **Key players in the market**

Some of the key players in Neurofeedback-as-a-Service Market include Emotiv, BrainMaster Technologies, NeuroSky, Muse (InteraXon), Neurofeedback.com, Myndlift, BrainPaint, BeeMedic, NeuroCare Group, Thought Technology, iMotions, OpenBCI, MindMedia, Neurobit, Brain Products, and Neuroelectrics.

### **Key Developments:**

In November 2025, NeuroSky introduced mobile-compatible neurofeedback solutions, combining wearable EEG sensors with gamified training modules, broadening accessibility for consumer wellness and educational applications.

In October 2025, Emotiv expanded its cloud-based neurofeedback services with AI-driven analytics, enabling personalized brain training programs for stress reduction, focus improvement, and cognitive enhancement across consumer and clinical markets.

In June 2025, Muse (InteraXon) upgraded its neurofeedback meditation headbands with cloud-based tracking, enabling users to access real-time brainwave insights and personalized training programs for mindfulness and executive function improvement.

### **Service Models Covered:**

Subscription-Based Platforms

Pay-Per-Session Services

Enterprise Licensing Models

Remote Neurofeedback Services

Clinician-Managed Service Platforms

Direct-to-Consumer Services

#### Modalities Covered:

EEG-Based Neurofeedback

fNIRS-Based Neurofeedback

HEG Neurofeedback

Multimodal Neurofeedback Systems

AI-Augmented Neurofeedback

Closed-Loop Neurofeedback Platforms

#### Distribution Channels Covered:

Cloud-Based Platforms

Mobile Neurofeedback Applications

Wearable-Integrated Systems

Telehealth-Enabled Platforms

Clinic-Based Digital Services

#### Applications Covered:

Mental Health Therapy

ADHD & Cognitive Disorders

Stress & Anxiety Management

Sleep Optimization

Peak Performance Training

Other Applications

#### Regions Covered:

##### North America

United States

Canada

Mexico

##### Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

#### Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

#### South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

§ Saudi Arabia

§ United Arab Emirates

§ Qatar

§ Israel

§ Rest of Middle East

Africa

§ South Africa

§ Egypt

§ Morocco

§ Rest of Africa

**What our report offers:**

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

### **Free Customization Offerings:**

All the customers of this report will be entitled to receive one of the following free customization options:

#### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

#### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

#### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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