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Telepresence Surgical Training Market Forecasts to 2032 – Global Analysis By Robot Type (Mobile Telepresence Robots and Stationary Telepresence Units), Component, Technology, Application, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Telepresence Surgical Training Market is accounted for $768.6 million in 2025 and is expected to reach $2,107.6 million by 2032 growing at a CAGR of 15.5% during the forecast period. Telepresence surgical training refers to the use of advanced remote communication technologies such as high-definition video, augmented reality (AR), and virtual reality (VR) to facilitate immersive, real-time surgical education. It enables expert surgeons to mentor trainees across geographic boundaries by observing procedures, providing live feedback, and demonstrating techniques virtually. This approach enhances access to specialized knowledge, supports collaborative learning, and addresses limitations in traditional surgical training models, particularly in underserved or remote regions

According to Journal of Telemedicine and Telecare, XR-based cochlear implant surgeries using the TeleSTAR telepresence system, over 150 individuals including healthcare professionals, biomedical engineers, and medical students were successfully trained across five remote locations with low latency and high-quality streaming.

Market Dynamics:

Driver:

Rapid development of robotic systems, high-speed and low-latency networks

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The rapid evolution of robotic platforms and the deployment of ultra-fast, low-latency communication networks are significantly transforming surgical training environments. These technologies enable real-time interaction between trainees and instructors across geographies, simulating high-fidelity surgical procedures with minimal delay. Enhanced connectivity supports seamless data transmission, video streaming, and remote control of robotic instruments. Moreover, the convergence of 5G infrastructure and edge computing is accelerating the adoption of telepresence systems in medical education.

Restraint:

Lack of haptic feedback & technical complexities

Surgeons rely heavily on haptic cues to assess tissue resistance, pressure, and instrument sensitivity elements that are difficult to replicate in virtual environments. Additionally, the integration of complex hardware and software systems demands specialized technical expertise, which can hinder widespread adoption. Compatibility issues between robotic platforms and training modules further complicate deployment.

Opportunity:

Integration with AI and simulation expanding use cases

AI-driven analytics can assess trainee performance, identify procedural errors, and offer personalized feedback, thereby enhancing learning outcomes. Simulation platforms integrated with telepresence systems allow for dynamic scenario modeling, enabling trainees to practice rare or complex surgeries in a controlled environment. This convergence is also facilitating cross-disciplinary collaboration, where experts from different specialties can co-train or mentor remotely.

Threat:

Data security and privacy concerns

Concerns surrounding cybersecurity and patient data privacy are emerging as significant threats to the telepresence surgical training market. These platforms often transmit sensitive clinical information, including live surgical feeds and patient records, across cloud-based networks. Any breach or unauthorized access could compromise institutional integrity and violate regulatory compliance. Moreover, the increasing

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reliance on third-party software and remote access tools introduces vulnerabilities that can be exploited by malicious actors.

Covid-19 Impact:

The COVID-19 pandemic acted as a catalyst for the adoption of telepresence technologies in surgical training. With travel restrictions and social distancing mandates in place, medical institutions pivoted toward remote learning platforms to ensure continuity in skill development. Telepresence systems enabled real-time mentoring and procedural demonstrations without physical proximity, helping bridge the gap created by suspended in-person training programs. Additionally, the pandemic underscored the need for scalable and resilient training infrastructures, prompting increased investment in virtual simulation and robotic interfaces.

The mobile telepresence robots segment is expected to be the largest during the forecast period

The mobile telepresence robots segment is expected to account for the largest market share during the forecast period due to their versatility and adaptability in surgical training environments. These robots facilitate real-time interaction between instructors and trainees, allowing movement within operating rooms or simulation labs. Their ability to navigate physical spaces and provide live audiovisual feedback enhances the realism of remote training sessions. Institutions favor mobile platforms for their flexibility in accommodating various surgical specialties and training formats.

The skill assessment & certification segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the skill assessment & certification segment is predicted to witness the highest growth rate driven by the growing demand for standardized surgical competency evaluation. Telepresence platforms integrated with AI and analytics tools are enabling objective performance tracking, procedural scoring, and automated feedback. These capabilities support credentialing processes and help institutions ensure that trainees meet rigorous clinical standards. The shift toward outcome-based education and global accreditation frameworks is further propelling growth in this segment.

Region with largest share:

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During the forecast period, the North America region is expected to hold the largest market share attributed to its advanced healthcare infrastructure and early adoption of robotic surgical systems. Leading academic institutions and hospitals in the U.S. and Canada are actively integrating telepresence platforms into their training curricula. Additionally, collaborations between tech companies and healthcare providers are accelerating the deployment of next-generation training solutions, reinforcing North America's leadership in this domain.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR fueled by expanding healthcare access, rising investments in medical education, and increasing demand for skilled surgical professionals. Countries like China, India, and South Korea are rapidly modernizing their training infrastructure, incorporating telepresence and simulation technologies to address workforce shortages. Government initiatives promoting digital health and cross-border education are also contributing to market expansion.

Key players in the market

Some of the key players in Telepresence Surgical Training Market include Intuitive Surgical, Inc., Medtronic plc, CMR Surgical, Surgical Science, VirtaMed AG, CAE Healthcare, 3D Systems, Stryker Corporation, Johnson & Johnson, Asensus Surgical, Inc., ImmersiveTouch, Inc., Zimmer Biomet, OSSimTech, Avra Robotics, Inc., Stereotaxis, Inc., Medrobotics Corporation, Smith & Nephew plc, PROCEPT BioRobotics, Siemens Healthineers, and Renishaw plc.

Key Developments:

In June 2025, ImmersiveTouch, Inc. announced the acquisition of a majority stake in HealthpointCapital marking a private-equity investment in the extended-reality surgical-training platform.

In May 2025, Medtronic announced intent to separate its Diabetes business into a distinct company, describing the strategic rationale, expected financial impacts and an ~18-month timeline.

In April 2025, CMR Surgical closed a $200M+ financing round (equity + debt) to accelerate growth and expansion of its Versius robotic platform into new markets. The

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financing was presented as support for U.S. rollout and scale-up of manufacturing and commercial operations.

Robot Types Covered:

- Mobile Telepresence Robots
- Stationary Telepresence Units

Components Covered:

- Hardware
- Software
- Services

Technologies Covered:

- Virtual Reality (VR)
- Augmented Reality (AR)
- Mixed Reality (MR)
- Real-time Video Conferencing & Proctoring
- Other Technologies

Applications Covered:

- Preoperative Planning
- Intraoperative Guidance and Mentoring
- Skill Assessment & Certification

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- Postoperative Review
- Other Applications

End Users Covered:

- Hospitals & Clinics
- Academic & Research Institutions
- Ambulatory Surgical Centers
- Medical Device Companies
- Military Organizations
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy

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- France
- Spain
- Rest of Europe

Asia Pacific

- Japan
- China
- India
- Australia
- New Zealand
- South Korea
- Rest of Asia Pacific

South America

- Argentina
- Brazil
- Chile
- Rest of South America

Middle East & Africa

- Saudi Arabia
- UAE
- Qatar

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South Africa

Rest of Middle East & 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 2024, 2025, 2026, 2028, and 2032
- 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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Contents

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11 KEY DEVELOPMENTS

12 COMPANY PROFILING

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List Of Tables

LIST OF TABLES

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Table 38 Global Telepresence Surgical Training Market Outlook, By Other End Users (2024-2032) ($MN)
Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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