

Digital Assistants in Healthcare Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product (Smart Speakers and Chatbots), By User Interface (Automatic Speech Recognition, Text-based, and Text-to-speech), By Application (Patient Tracking, Medical Reference, Diagnostic Guides, Drug Dosage, Medical Calculators, Nursing Reference, and Other Applications), By End User (Healthcare Providers, Healthcare Payers, and Patients), By Region and Competition

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Abstracts

The Global Digital Assistants in Healthcare Market was valued at USD 541.06 Million in 2022 and is expected to experience significant growth during the forecast period, with a projected Compound Annual Growth Rate (CAGR) of 14.32% and expected to reach USD 1229.10 Million through 2028. Digital assistance in healthcare pertains to providing healthcare services through remote monitoring and virtual patient interactions. Digital assistants in healthcare are virtual or digital tools that utilize artificial intelligence (AI) and natural language processing (NLP) technologies to engage with patients, healthcare professionals, and other stakeholders within the healthcare ecosystem. These services encompass activities such as reaching out to patients at their residences, analyzing symptoms through mobile applications, and accessing disease-related information via smart speakers. A variety of digital assistant products, including smart speakers, web-based chatbots, and mobile-based chatbots, are available. The advantages of employing digital assistants in healthcare are inclusive of cost-effective treatment options, seamless connectivity between patients and healthcare

professionals, patient data monitoring, and efficient scheduling of patient appointments, ultimately leading to time savings for both patients and healthcare providers.

Key Market Drivers

Increased Demand for Home-Based Monitoring Devices

The heightened demand for home-based monitoring devices is intricately linked with the growth of digital assistance in healthcare. These two trends are interrelated and mutually reinforcing, driving each other's progress. Home-based monitoring devices such as wearable fitness trackers, smart scales, blood pressure monitors, and glucose meters collect real-time health data from patients. Digital assistants can seamlessly integrate with these devices to gather, analyze, and interpret the data, providing patients with instant feedback and insights into their health status. Utilizing the data collected by home-based monitoring devices, digital assistants can offer personalized health insights and recommendations. For instance, if a patient consistently records elevated blood pressure readings, the digital assistant can suggest lifestyle adjustments, medications, or prompt the patient to consult their healthcare provider. When home-based monitoring devices identify abnormal readings or potential health risks, digital assistants can send alerts and notifications to both patients and healthcare providers. This timely communication enables early intervention and prevents health complications. The combination of home-based monitoring devices and digital assistants aligns with the patient-centric care trend, empowering individuals to play an active role in their health management. This integrated approach not only enhances patient outcomes but also contributes to the overall transformation of healthcare delivery by enabling personalized, convenient, and efficient interactions between patients and healthcare providers.

Rise in Individuals with Chronic Health Issues

The increase in the number of individuals with chronic health conditions and the growing demand for home-based monitoring devices are key drivers of growth in the digital assistant market within the healthcare sector. The need to effectively manage healthcare expenses has created promising opportunities for companies operating in the global digital assistants in healthcare market. In recent years, there has been a substantial rise in the adoption of home-based devices across all age groups. These devices are compact, portable, and enable continuous monitoring of patients' conditions. Consequently, the demand for home-based devices has surged, contributing

to the overall expansion of the global digital assistants in healthcare market. The projected growth in the elderly population further fuels the demand for such devices, thereby supporting market growth.

Increasing Adoption in the Consumer Electronics Sector

The rapid adoption of consumer electronics, including smartphones, smartwatches, and smart speakers, is driving significant growth in the consumer electronics sector. As consumers become more reliant on smart devices, digital assistants have become indispensable for tasks such as accessing sports scores, placing food orders, and managing schedules. To address the growing complexity of work, organizations are increasingly relying on intelligent virtual assistants to efficiently manage workloads and promptly address customer inquiries. These advanced virtual assistants also facilitate seamless communication between humans and machines, utilizing voice recognition technology to convert spoken words and phrases into machine-readable formats. These factors are projected to drive the market for intelligent virtual assistants in the forecasted period. Market expansion is further fueled by the demand for enhanced efficiency among service-based businesses, which are integrating AI-powered virtual assistants across a range of devices, including tablets, desktops, and smartphones.

Increasing Technological Advancements

Advancements in both software and hardware solutions are driving the growing demand for mobile health applications in the market. Virtual assistant (VAS) technologies enable patients to utilize mobile health apps such as Amazon Echo to conveniently refill prescriptions, schedule appointments, scan health records, and complete forms in advance. Wearables are gaining popularity for health tracking and providing emergency alerts as part of virtual assistance. By leveraging advanced fitness devices like Fitbit, users can effortlessly monitor health metrics such as heart rate, blood pressure, and weight, with easy access to data through online portals. An example of innovative utilization includes YugasaBot, an Indian-made platform for automating healthcare communication over WhatsApp. This AI-powered chatbot assists ASHA workers in addressing health-related inquiries and policies for village residents as part of the DIISHA (Digital Innovations Interventions for Sustainable Healthtech Action) healthcare pilot. With YugasaBot, ASHA workers gain answers to policy questions on WhatsApp around the clock, in their preferred language.

Key Market Challenges

Privacy and Security Concerns

Healthcare data is highly sensitive and subject to strict privacy regulations. Concerns about the security of patient information and potential data breaches can discourage both patients and healthcare providers from using digital assistants. Patients entrust healthcare providers with their personal and sensitive health information. The use of digital assistants raises concerns about who has access to this data and how it is stored, shared, and used. Any perceived or actual breach of patient confidentiality can erode trust in healthcare organizations and deter patients from using digital tools. Healthcare data is subject to strict regulations, such as the Health Insurance Portability and Accountability Act (HIPAA) in the United States and similar laws in other countries. Digital assistants must adhere to these regulations to ensure that patient data is handled securely and in accordance with legal requirements. Failure to comply can result in severe penalties. Many digital assistants rely on cloud-based storage and processing of data. While this can enhance functionality, it also raises concerns about the security of data stored in external servers.

User Interface Challenges

Not all patients, especially elderly or technologically challenged individuals, may be comfortable using or interacting with digital assistants. Difficulties with user interfaces, especially for those with disabilities, can limit adoption. Digital assistants must be capable of understanding and accommodating diverse languages, accents, and cultural contexts to effectively communicate with a broad patient population. Patients in underserved or resource-limited areas may have limited access to the necessary technology to use digital assistants effectively. Many elderly individuals may not be familiar with or comfortable using technology, including voice-activated digital assistants. Complex user interfaces, small fonts, and technical jargon can be intimidating and confusing for this demographic. Technologically challenged individuals, regardless of age, may struggle to navigate digital assistant interfaces. These users might find it challenging to interact effectively with the technology, leading to frustration and reduced usage. Individuals with visual impairments may encounter difficulties with text-based interfaces, while those with hearing impairments may struggle with voice-based interactions. Lack of compatibility with assistive technologies can exacerbate these challenges.

Key Market Trends

Rise of Remote and Telehealth Services

The expansion of telehealth and remote healthcare services is expected to create a greater need for digital assistants. These assistants can facilitate virtual consultations, help patients manage chronic conditions from home, and assist healthcare providers in delivering remote care. Digital assistants can engage patients before, during, and after telehealth appointments. They can provide reminders about upcoming virtual consultations, gather pre-visit information, and offer post-appointment follow-up instructions. This heightened engagement contributes to more productive and personalized telehealth interactions. For patients managing chronic conditions or recovering from medical procedures at home, digital assistants can collect and relay real-time health data to healthcare providers during telehealth consultations. This allows providers to make informed decisions based on accurate and up-to-date information.

Integration with Wearable Devices

Digital assistants can seamlessly integrate with wearable health devices, such as fitness trackers and smartwatches, to monitor and track vital signs, activity levels, and other health metrics. This integration enhances the accuracy of health insights and recommendations. Wearable health devices can continuously monitor vital signs such as heart rate, blood pressure, temperature, and oxygen saturation. By integrating with digital assistants, users can receive real-time updates on their health status, allowing for prompt interventions if any abnormalities are detected. Combining data from wearable devices with user profiles and medical history, digital assistants can offer tailored health recommendations. These recommendations may include exercise routines, dietary adjustments, stress management techniques, and more. As wearable health devices become more advanced and capable of capturing a wide range of health metrics, the integration with digital assistants enhances their value by translating raw data into actionable insights and recommendations. This integration empowers individuals to take proactive control of their health, facilitates communication between patients and healthcare providers, and contributes to the shift towards preventive and personalized healthcare.

Segmental Insights

Product Insights

The smart speakers segment emerged as the primary revenue contributor to the market. Moreover, advancements in smart speakers, such as the Suli app designed for diabetes, also known as Diabetes Guru, offer valuable disease information and address

related queries. Conversely, the chatbots segment is projected to experience significant growth in the virtual assistance in healthcare market size during the forecast period. This can be attributed to the increased utilization of web-based chatbots and healthcare mobile apps.

User Interface Insights

The segmentation of the Digital Assistant Market, based on user interface, encompasses automatic speech recognition, text-based, and text-to-speech. The automatic speech recognition segment holds the largest market share and is expected to continue growing throughout the forecast period. The growth of this segment can be attributed to the widespread adoption of smart speakers across various industries. Smart speakers are capable of speech recognition and responding to user-generated speech in a specified manner. With the increasing usage of mobile computing technology, there is a growing demand for automatic voice recognition. Customers can now interact more efficiently with their smartphones and applications. As major smart speaker manufacturers such as Amazon Alexa, Google Home, and Bose have their headquarters in the United States, most of their devices are initially introduced and distributed there. Automated speech recognition (ASR) enables users to have natural conversations with electronic devices such as telephones and computer interfaces. The recent development of advanced ASR technology known as 'natural language processing' facilitates the most seamless communication between humans and computers. Intelligent virtual assistants utilize user interfaces such as text-to-text, text-to-speech, and automatic speech recognition. These assistants are predominantly employed by end users in retail, BFSI, healthcare, telecom, and other sectors.

Regional Insights

The North America market demonstrated dominance in terms of revenue among other regions in 2022, primarily driven by the growing demand for virtual assistant tools and the introduction of new products. Furthermore, Europe emerged as the second-largest contributor in the market during the same period and is projected to experience the fastest compound annual growth rate (CAGR) due to the increasing adoption of virtual assistance in healthcare and the continuous growth in product innovations. The rising prevalence of chronic illnesses, the desire for home monitoring devices, and the aging population play crucial roles in driving the expansion of digital assistants in the healthcare sector. These devices are now being utilized by individuals of all age groups as they are lightweight, portable, and provide continuous monitoring of patients' health. Moreover, the market's growth is further fueled by the need to maintain consistent

healthcare spending.

Key Market Players

Amazon.com, Inc.

Microsoft Corporation

Verint Systems Inc.

ADA Digital Health

Nuance Communications Inc.

Sensely Inc.

eGain Corporation

Healthtap Inc.

CSS Corporation Pvt Ltd

Babylon Healthcare Services Limited

Report Scope:

In this report, the Global Digital Assistants in Healthcare Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Digital Assistants in Healthcare Market, By Product:

Smart Speakers

Chatbots

Digital Assistants in Healthcare Market, By User Interface:

Automatic Speech Recognition

Text-based

Text-to-speech

Digital Assistants in Healthcare Market, By Application:

Patient Tracking

Medical Reference

Diagnostic Guides

Drug Dosage

Medical Calculators

Nursing Reference

Other Applications

Digital Assistants in Healthcare Market, By End User:

Healthcare Providers

Healthcare Payers

Patients

Digital Assistants in Healthcare Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Digital Assistants in Healthcare Market.

Available Customizations:

Global Digital Assistants in Healthcare market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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