

India Telemedicine Market, By Component (Services & Software v/s Hardware), By Deployment Mode (Cloud v/s On-Premise), By Type (Tele-Hospitals, mHealth, Tele-Homes), By Technology (Store & Forward, Real Time, Others), By Delivery Mode (Audio-Visual, Only Audio, Written), By Application (Tele-Psychiatry, General Consultations, Tele-Radiology, Tele-Pathology, Others), By End User (Patients, Provider, Payers), By Region, Competition Forecast & Opportunities, FY2027

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Abstracts

India telemedicine market stood at USD1314.83 million in FY2021 and is expected to grow at a robust CAGR of around 22.31% during the forecast period. This can be ascribed to the improving healthcare IT infrastructure across the country coupled with increasing digitization in India. Additionally, the growing prevalence of chronic and infectious diseases in the country with a shortage of healthcare professionals and physicians are further expected to support the market growth through FY2027. Besides, the sudden outbreak and spread of COVID-19 across the country and imposition of strict nationwide lockdown to curtail the virus spread new opportunities for the growth of telemedicine market across India. Due to the fear of virus spread and catching infection, the patients and their families avoided visiting hospitals and physicians' clinics and preferred consulting remotely through telemedicine services. In addition, the hospitals and doctors focused on providing treatment and assistance specifically to COVID-19 patients and the outpatient services were also shut. Hence, the outpatient patients preferred availing telemedicine services. This in turn is expected to positively influence

the market growth over the next few years. In October 2020, the Insurance Regulatory and Development Authority of India (IRDAI) asked the insurance companies to allow claim settlement for telemedicine consultation wherever normal consultation with a medical practitioner is allowed in the terms and conditions of the policy contract. This in turn is expected to boost the market growth over the next few years. Additionally, supportive government policies & schemes such as the Government of India's eSanjeevani initiative has gained a lot of popularity among the doctors, telemedicine companies and patients as well.

India telemedicine market is segmented into component, deployment model, type, technology, delivery mode, application, end-user, region, and company. In terms of deployment model, the market can be split into cloud and on-premises. The cloud segment is expected to dominate the market in FY2021 with an overall market share of around 71.68%. This can be attributed to the benefits such as the provision of remote accessibility of data and overall reduced operational costs associated with the cloud segment. In terms of type, the market can be segmented into tele-hospitals, mHealth and tele-homes. The tele-hospitals segment is expected to dominate the market through FY2027. This can be attributed to the increasing adoption and usage of telemedicine services in hospital setting to consult various specialists by doctors. This not only resulted in cost savings for the hospital but also for the patient. While tele-homes segment will also witness growth in the coming years on account of the increasing digitization and increasing internet proliferation across the country. Also, a growing health-conscious population coupled with supportive government policies and initiatives are expected to create lucrative opportunities for segmental growth over the next few years.

The major players operating in the India telemedicine market include Apollo Telehealth Services Private Limited, Practo Technologies Private Limited, 1MG Technologies Private Limited, DocOnline Health India Private Limited, Lybrate India Private Limited, Netdox Health Private Limited, Allscripts Healthcare Technologies (India) Private Limited, Dhanush Digital Health Private Limited, Novocura Tech Health Services Private Limited, Zoylo Digihealth Pvt Ltd, Vidmed Health Technologies Private Limited, TeleVital India Pvt Ltd, Neurosynaptic Communications Private Limited, Netmeds Marketplace Limited, Netdox Health Private Limited, among others. The companies operating in the market are following organic strategies such as new service launches, providing add-on facilities and services to their clients, improvising their telemedicine services, among others, to stay competitive in the market and have an edge over the other players.

Years considered for this report:

Historical Years: FY2017-FY2020

Base Year: FY2021

Estimated Year: FY2022

Forecast Period: FY2023–FY2027

Objective of the Study:

To analyze the historical growth in the market size of India telemedicine market from FY2017 to FY2020.

To estimate and forecast the market size of India telemedicine market from FY2021 to FY2027 and growth rate until FY2027.

To classify and forecast India telemedicine market based on component, deployment mode, type, technology, delivery mode, application, end user, region, and company.

To identify dominant region or segment in the India telemedicine market

To identify drivers and challenges for India telemedicine market

To examine competitive developments such as expansions, new product launches, mergers & acquisitions, etc., in India telemedicine market.

To identify and analyze the profile of leading players operating in India telemedicine market.

To identify key sustainable strategies adopted by market players in India telemedicine market.

TechSci Research performed both primary as well as exhaustive secondary research for this study. Initially, TechSci Research sourced a list of service providers across the

country. Subsequently, TechSci Research conducted primary research surveys with the identified companies. While interviewing, the respondents were also enquired about their competitors. Through this technique, TechSci Research could include the service providers who could not be identified due to the limitations of secondary research. TechSci Research analyzed the service providers, distribution channels and presence of all major players across the country.

TechSci Research calculated the market size of India telemedicine market using a bottom-up approach, wherein data for various end-user segments was recorded and forecast for the future years. TechSci Research sourced these values from the industry experts and company representatives and externally validated through analyzing historical data of these product types and applications for getting an appropriate, overall market size. Various secondary sources such as company websites, news articles, press releases, company annual reports, investor presentations and financial reports were also studied by TechSci Research.

Key Target Audience:

Telemedicine service provider companies

Hospitals & Clinics, Ambulatory Care Centers, Doctors/Healthcare Professionals

Market research and consulting firms

Government bodies such as regulating authorities and policy makers

Organizations, forums, and alliances related to telemedicine market

The study is useful in providing answers to several critical questions that are important for the industry stakeholders such as service providers, partners, end users, etc., besides allowing them in strategizing investments and capitalizing on market opportunities.

Report Scope:

In this report, India telemedicine market has been segmented into following categories, in addition to the industry trends which have also been detailed below:

India Telemedicine Market, By Component:

Services & Software

Hardware

India Telemedicine Market, By Deployment Mode:

Cloud

On-premise

India Telemedicine Market, By Type:

Tele-Hospitals

mHealth

Tele-Homes

India Telemedicine Market, By Technology:

Store & Forward

Real Time

Others

India Telemedicine Market, By Delivery Mode:

Audio-Visual

Only Audio

Written

India Telemedicine Market, By Application:

Tele-Psychiatry

General Consultations

Tele-Radiology

Tele-Pathology

Others

India Telemedicine Market, By End User:

Patients

Provider

Payers

India Telemedicine Market, By Region:

South

West

North

East

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in India telemedicine market.

Available Customizations:

With the given market data, TechSci 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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