

Online Therapy Services Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Cognitive Behavioral Therapy, Psychodynamic Therapy, Personal Centered Therapy), By Tools (Email, Mobile Device Apps, Real Time Instant Messaging, Telephone, Video Conferencing), By Application (Residential Use, Commercial), By Region and Competition

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Abstracts

Global Online Therapy Services Market has valued at USD 2.68 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 8.95% through 2028. The Online Therapy Services Market is experiencing significant growth and transformation, reshaping the landscape of mental health care delivery. As the demand for accessible, convenient, and personalized mental health support rises, online therapy services have emerged as a crucial component of the healthcare ecosystem. This market encompasses a diverse range of platforms and applications that provide mental health services through virtual channels, allowing individuals to connect with licensed therapists, counselors, and mental health professionals remotely. One of the key drivers behind the expansion of the Online Therapy Services Market is the increasing awareness and destigmatization of mental health issues. With societal attitudes evolving, more individuals are seeking mental health support, and online therapy services offer a discreet and convenient avenue for seeking help. The accessibility of these services transcends geographical barriers, reaching individuals who may face challenges in accessing traditional in-person therapy.

Technological advancements and the ubiquity of internet connectivity have played a

pivotal role in the market's growth. Mobile applications, web platforms, and virtual communication tools enable seamless interactions between clients and mental health professionals. Video conferencing, instant messaging, and chat-based therapy sessions have become integral features, providing users with flexible options to engage in therapy according to their preferences. The COVID-19 pandemic has further accelerated the adoption of online therapy services. Lockdowns, social distancing measures, and the overall impact of the pandemic on mental health have underscored the need for remote mental health support. Online therapy services have proven invaluable in ensuring continuity of care during challenging times, establishing them as a resilient and essential component of the mental health ecosystem. The market is characterized by a diverse range of providers, including standalone platforms, mental health-focused startups, and established healthcare organizations incorporating virtual mental health services into their offerings. Some platforms specialize in certain therapeutic modalities, such as cognitive-behavioral therapy (CBT), while others provide a broader spectrum of therapeutic approaches.

The Online Therapy Services Market not only caters to individuals seeking support but also extends its reach to employers and organizations prioritizing employee mental health. Corporate wellness programs increasingly integrate virtual mental health services to address stress, burnout, and other mental health challenges within the workforce. Despite its rapid growth, the market faces certain challenges. Privacy and security concerns, the need for effective regulation, and the potential limitations of virtual therapy in handling severe mental health conditions are areas that require careful consideration. Striking a balance between leveraging technology for accessibility and ensuring the highest standards of care remains an ongoing endeavor for the industry. In conclusion, the Online Therapy Services Market represents a dynamic and evolving sector at the intersection of healthcare and technology. With a growing emphasis on mental health, technological innovation, and the changing dynamics of healthcare delivery, online therapy services are poised to play a central role in shaping the future of mental health care, offering a scalable and accessible solution for individuals seeking support in managing their mental well-being.

Key Market Drivers

Increased Integration of Artificial Intelligence (AI)

The Online Therapy Services Market is undergoing a transformative shift with the increased integration of Artificial Intelligence (AI), which is fundamentally altering the way mental health support is delivered. AI is being leveraged to enhance the

accessibility, efficiency, and personalization of online therapy platforms. One key aspect of this trend is the incorporation of AI-driven chatbots and virtual assistants. These intelligent systems serve as initial points of contact, engaging users in conversation to assess their mental health status, gather relevant information, and provide immediate support. These virtual assistants offer a scalable solution, ensuring that individuals can access preliminary assistance promptly, even in high-demand situations.

Moreover, AI is contributing to the personalization of therapy experiences. Machine learning algorithms analyze user data, including preferences, responses, and therapeutic progress, to tailor interventions based on individual needs. This personalization fosters a more engaging and effective therapeutic journey, as interventions can be adapted in real-time to suit the user's evolving mental health requirements. AI also plays a role in predictive analytics, helping therapists and mental health professionals identify potential risk factors or relapses. By analyzing patterns in user data, AI algorithms can provide insights into potential challenges or areas that may require additional attention, allowing therapists to proactively address issues and optimize treatment plans.

Additionally, AI is supporting the development of advanced therapeutic tools. Virtual reality (VR) and augmented reality (AR) applications, guided by AI algorithms, create immersive and interactive therapeutic experiences. These technologies enhance exposure therapy, simulate real-world scenarios, and provide a dynamic platform for therapists to engage with clients, offering innovative avenues for mental health support. As the Online Therapy Services Market continues to embrace AI, it brings forth a new era of accessibility and effectiveness in mental health care. The intelligent integration of AI technologies not only addresses the increasing demand for mental health services but also contributes to the ongoing evolution of online therapy platforms, making them more responsive, personalized, and capable of delivering impactful mental health interventions.

Specialized Platforms and Niche Offerings

The Online Therapy Services Market is experiencing a notable shift towards specialized platforms and niche offerings, driven by a growing recognition of the diverse mental health needs of individuals. This trend is reshaping the landscape of online therapy, providing users with more tailored and targeted interventions. Specialized platforms are emerging to address specific mental health concerns, demographic groups, or therapeutic modalities. For instance, platforms focusing on stress management, mindfulness, or specific populations such as LGBTQ+ communities are gaining

prominence. These specialized offerings cater to individuals seeking highly tailored and focused mental health support, acknowledging that a one-size-fits-all approach may not be sufficient to address the intricacies of various mental health challenges. The appeal of specialized platforms lies in their ability to create a more immersive and relevant therapeutic experience. Users can access resources and interventions specifically designed for their unique needs, fostering a sense of resonance and understanding. This targeted approach enhances user engagement and satisfaction, as individuals feel seen and validated in their specific mental health journey. Moreover, niche offerings within online therapy are expanding beyond traditional therapeutic models. Some platforms incorporate alternative or complementary therapeutic approaches, such as art therapy, music therapy, or ecotherapy. This diversification allows users to explore therapeutic modalities that resonate with their personal preferences and values.

The rise of specialized platforms aligns with the broader trend of personalized medicine in mental health care. Users are increasingly seeking services that align with their identities, values, and specific mental health concerns. This trend not only meets the demand for more customized mental health support but also contributes to the destigmatization of seeking therapy by offering inclusive and welcoming spaces for individuals with diverse needs. As the Online Therapy Services Market continues to evolve, the proliferation of specialized platforms and niche offerings signifies a more nuanced and responsive approach to mental health care. This trend is indicative of a paradigm shift towards recognizing and addressing the unique and multifaceted nature of individuals' mental health, fostering a more inclusive and accessible landscape for online therapy services.

Key Market Challenges

Privacy and Security Concerns

Privacy and security concerns pose a significant challenge for the Online Therapy Services Market. Given the sensitive nature of mental health information shared during therapy sessions, ensuring the confidentiality and protection of user data is paramount. Threats of data breaches, unauthorized access, or inadvertent disclosure raise apprehensions among users. Platforms must implement robust encryption, authentication measures, and stringent privacy policies to instill trust. Navigating the delicate balance between providing accessible mental health care and safeguarding user privacy is an ongoing challenge that requires continuous vigilance and adherence to evolving data protection standards and regulations.

Regulatory Compliance

Regulatory compliance presents a notable challenge for the Online Therapy Services Market. The industry operates in a complex regulatory landscape with varying requirements across regions, including licensure for therapists and adherence to healthcare standards. Ensuring compliance with these diverse regulations poses a significant hurdle for online therapy platforms, particularly those offering services globally. Navigating the intricacies of licensing requirements, data protection laws, and healthcare regulations demands ongoing diligence. Achieving and maintaining regulatory compliance is essential not only for legal adherence but also for building trust among users and stakeholders in an evolving and dynamic online mental health care environment.

Effective Therapist-Client Relationship

Establishing and maintaining an effective therapist-client relationship poses a challenge for the Online Therapy Services Market. The virtual nature of online therapy introduces barriers to the natural interpersonal dynamics found in face-to-face interactions. Overcoming technological glitches, ensuring clear communication, and fostering a sense of trust and connection are ongoing challenges. Building a strong therapeutic alliance, which is crucial for positive mental health outcomes, requires innovative approaches to bridge the virtual gap. Online therapy platforms must continually address these challenges to enhance user experience, build rapport, and ensure that clients receive the quality of care that is fundamental to the success of therapeutic interventions.

Handling Crisis Situations

Handling crisis situations presents a notable challenge for the Online Therapy Services Market. While online therapy offers accessibility, addressing urgent mental health crises such as suicidal ideation requires immediate and effective interventions. Online platforms must have robust protocols in place to identify and respond to crisis situations promptly. Ensuring that users have access to emergency support, including helplines or local emergency services, is crucial. The challenge lies in navigating the complexities of crisis management in a virtual environment, emphasizing the need for well-defined procedures, trained staff, and seamless coordination to safeguard the well-being of individuals accessing online therapy services during critical moments.

Key Market Trends

Integration of Virtual Reality (VR) and Augmented Reality (AR)

The integration of Virtual Reality (VR) and Augmented Reality (AR) is a transformative trend in the Online Therapy Services Market. VR and AR technologies are enhancing the therapeutic experience by creating immersive environments for mental health interventions. Therapists can leverage these technologies for exposure therapy, simulations, and interactive exercises, providing users with a more engaging and realistic therapeutic journey. The trend signifies a shift toward innovative and advanced therapeutic modalities, offering users novel ways to engage with therapy and address mental health challenges through experiential and immersive interventions, ultimately contributing to more effective and personalized mental health care.

Artificial Intelligence (AI) for Personalized Interventions

The trend of leveraging Artificial Intelligence (AI) for personalized interventions is reshaping the Online Therapy Services Market. AI-driven tools analyze user data, including preferences and therapeutic progress, enabling tailored mental health interventions. Machine learning algorithms adapt therapy plans in real-time, providing users with highly customized and effective support. This trend marks a shift towards precision mental health care, recognizing the unique needs of individuals. By harnessing the power of AI, online therapy platforms can enhance user engagement, therapeutic outcomes, and overall satisfaction, contributing to a more dynamic and responsive landscape in the delivery of mental health services.

Expansion of Mobile Mental Health Apps

The expansion of Mobile Mental Health Apps is a prominent trend in the Online Therapy Services Market. These apps bring mental health support to users' fingertips, offering convenient access to therapy, self-help resources, and mental health tracking tools. The trend reflects a growing demand for on-the-go mental health solutions that cater to diverse needs. Mobile apps provide flexibility, enabling users to engage with therapy and mental health resources at their convenience. The proliferation of user-friendly applications underscores the industry's commitment to making mental health services more accessible, personalized, and integrated into individuals' daily lives, driving the ongoing evolution of online therapy.

Corporate Mental Health and Employee Assistance Programs (EAPs)

The incorporation of Corporate Mental Health and Employee Assistance Programs (EAPs) is a significant trend in the Online Therapy Services Market. Employers are increasingly recognizing the importance of prioritizing employee well-being and mental health. This trend involves integrating online therapy services into workplace initiatives to provide accessible mental health support to employees. By offering therapy services as part of comprehensive employee assistance programs, companies aim to address stress, burnout, and mental health challenges in the workplace. The trend signifies a proactive approach to employee well-being, contributing to the broader adoption of online therapy services in corporate settings for a healthier and more resilient workforce.

Segmental Insights

Type Insights

Based on the Type, Cognitive Behavioral Therapy (CBT) dominates the Online Therapy Services Market due to its evidence-based efficacy and adaptability to virtual platforms. CBT focuses on identifying and changing negative thought patterns and behaviors, making it conducive to online delivery. Its structured and goal-oriented nature aligns well with the format of online therapy sessions. Additionally, the interactive and skill-building components of CBT translate effectively into virtual interventions. As the most researched and widely practiced form of psychotherapy, CBT's prominence in the Online Therapy Services Market underscores its versatility and effectiveness in addressing a broad spectrum of mental health concerns through convenient and accessible virtual platforms.

Tools Insights

Mobile Device Apps dominate the Online Therapy Services Market due to their widespread accessibility and user-friendly interface. These apps empower users to engage with mental health support conveniently on their smartphones or tablets. The dominance of mobile apps reflects the increasing preference for on-the-go mental health solutions, providing individuals with anytime access to therapy, self-help resources, and mental health tools. The portability and convenience offered by mobile devices align with the evolving lifestyle patterns, making these apps a dominant force in expanding the reach of online therapy services and fostering a seamless integration of mental health care into users' daily lives.

Regional Insights

North America asserts dominance in the Online Therapy Services Market due to a combination of factors, including robust digital infrastructure, a high level of technological adoption, and increasing awareness of mental health importance. The region's proactive approach toward mental health destigmatization and widespread acceptance of online interventions contributes to market leadership. Additionally, the presence of major market players, coupled with a culture of seeking digital solutions for mental well-being, positions North America at the forefront. The region's favorable regulatory environment and a growing demand for accessible mental health care further solidify its dominant role in shaping the global online therapy landscape.

Key Market Players

TalkSpace

BetterHelp

MDLive

Calmerry

7 Ci Regain

Breakthrough

Doctor on Demand

Amwell

Pride Counseling

Cerebral

Report Scope:

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

Online Therapy Services Market, By Type:

Cognitive Behavioral Therapy

Psychodynamic Therapy

Personal Centered Therapy

Online Therapy Services Market, By Tools:

Email

Mobile Device Apps

Real Time Instant Messaging

Telephone

Video Conferencing

Online Therapy Services Market, By Application:

Residential Use

Commercial

Online Therapy Services 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

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Online Therapy Services Market.

Available Customizations:

Global Online Therapy Services 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).

Contents

1. SERVICE OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. GLOBAL ONLINE THERAPY SERVICES MARKET OUTLOOK

- 4.1. Market Size & Forecast
 - 4.1.1. By Value
- 4.2. Market Share & Forecast
 - 4.2.1. By Type (Cognitive Behavioral Therapy, Psychodynamic Therapy, Personal Centered Therapy)
 - 4.2.2. By Tools (Email, Mobile Device Apps, Real Time Instant Messaging, Telephone, Video Conferencing))
 - 4.2.3. By Application (Residential Use, Commercial)
 - 4.2.4. By Region

- 4.2.5. By Company (2022)
- 4.3. Market Map
 - 4.3.1. By Type
 - 4.3.2. By Tools
 - 4.3.3. By Application
 - 4.3.4. By Region

5. ASIA PACIFIC ONLINE THERAPY SERVICES MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Type
 - 5.2.2. By Tools
 - 5.2.3. By Application
 - 5.2.4. By Country
- 5.3. Asia Pacific: Country Analysis
 - 5.3.1. China Online Therapy Services Market Outlook
 - 5.3.1.1. Market Size & Forecast
 - 5.3.1.1.1. By Value
 - 5.3.1.2. Market Share & Forecast
 - 5.3.1.2.1. By Type
 - 5.3.1.2.2. By Tools
 - 5.3.1.2.3. By Application
 - 5.3.2. India Online Therapy Services Market Outlook
 - 5.3.2.1. Market Size & Forecast
 - 5.3.2.1.1. By Value
 - 5.3.2.2. Market Share & Forecast
 - 5.3.2.2.1. By Type
 - 5.3.2.2.2. By Tools
 - 5.3.2.2.3. By Application
 - 5.3.3. Australia Online Therapy Services Market Outlook
 - 5.3.3.1. Market Size & Forecast
 - 5.3.3.1.1. By Value
 - 5.3.3.2. Market Share & Forecast
 - 5.3.3.2.1. By Type
 - 5.3.3.2.2. By Tools
 - 5.3.3.2.3. By Application
 - 5.3.4. Japan Online Therapy Services Market Outlook

- 5.3.4.1. Market Size & Forecast
 - 5.3.4.1.1. By Value
- 5.3.4.2. Market Share & Forecast
 - 5.3.4.2.1. By Type
 - 5.3.4.2.2. By Tools
 - 5.3.4.2.3. By Application
- 5.3.5. South Korea Online Therapy Services Market Outlook
 - 5.3.5.1. Market Size & Forecast
 - 5.3.5.1.1. By Value
 - 5.3.5.2. Market Share & Forecast
 - 5.3.5.2.1. By Type
 - 5.3.5.2.2. By Tools
 - 5.3.5.2.3. By Application

6. EUROPE ONLINE THERAPY SERVICES MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Type
 - 6.2.2. By Tools
 - 6.2.3. By Application
 - 6.2.4. By Country
- 6.3. Europe: Country Analysis
 - 6.3.1. France Online Therapy Services Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Type
 - 6.3.1.2.2. By Tools
 - 6.3.1.2.3. By Application
 - 6.3.2. Germany Online Therapy Services Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Type
 - 6.3.2.2.2. By Tools
 - 6.3.2.2.3. By Application
 - 6.3.3. Spain Online Therapy Services Market Outlook

- 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
- 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Type
 - 6.3.3.2.2. By Tools
 - 6.3.3.2.3. By Application
- 6.3.4. Italy Online Therapy Services Market Outlook
 - 6.3.4.1. Market Size & Forecast
 - 6.3.4.1.1. By Value
 - 6.3.4.2. Market Share & Forecast
 - 6.3.4.2.1. By Type
 - 6.3.4.2.2. By Tools
 - 6.3.4.2.3. By Application
- 6.3.5. United Kingdom Online Therapy Services Market Outlook
 - 6.3.5.1. Market Size & Forecast
 - 6.3.5.1.1. By Value
 - 6.3.5.2. Market Share & Forecast
 - 6.3.5.2.1. By Type
 - 6.3.5.2.2. By Tools
 - 6.3.5.2.3. By Application

7. NORTH AMERICA ONLINE THERAPY SERVICES MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Type
 - 7.2.2. By Tools
 - 7.2.3. By Application
 - 7.2.4. By Country
- 7.3. North America: Country Analysis
 - 7.3.1. United States Online Therapy Services Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Type
 - 7.3.1.2.2. By Tools
 - 7.3.1.2.3. By Application
 - 7.3.2. Mexico Online Therapy Services Market Outlook

- 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
- 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Type
 - 7.3.2.2.2. By Tools
 - 7.3.2.2.3. By Application
- 7.3.3. Canada Online Therapy Services Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Type
 - 7.3.3.2.2. By Tools
 - 7.3.3.2.3. By Application

8. SOUTH AMERICA ONLINE THERAPY SERVICES MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Type
 - 8.2.2. By Tools
 - 8.2.3. By Application
 - 8.2.4. By Country
- 8.3. South America: Country Analysis
 - 8.3.1. Brazil Online Therapy Services Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Type
 - 8.3.1.2.2. By Tools
 - 8.3.1.2.3. By Application
 - 8.3.2. Argentina Online Therapy Services Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Type
 - 8.3.2.2.2. By Tools
 - 8.3.2.2.3. By Application
 - 8.3.3. Colombia Online Therapy Services Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Type

8.3.3.2.2. By Tools

8.3.3.2.3. By Application

9. MIDDLE EAST AND AFRICA ONLINE THERAPY SERVICES MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Type

9.2.2. By Tools

9.2.3. By Application

9.2.4. By Country

9.3. MEA: Country Analysis

9.3.1. South Africa Online Therapy Services Market Outlook

9.3.1.1. Market Size & Forecast

9.3.1.1.1. By Value

9.3.1.2. Market Share & Forecast

9.3.1.2.1. By Type

9.3.1.2.2. By Tools

9.3.1.2.3. By Application

9.3.2. Saudi Arabia Online Therapy Services Market Outlook

9.3.2.1. Market Size & Forecast

9.3.2.1.1. By Value

9.3.2.2. Market Share & Forecast

9.3.2.2.1. By Type

9.3.2.2.2. By Tools

9.3.2.2.3. By Application

9.3.3. UAE Online Therapy Services Market Outlook

9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Type

9.3.3.2.2. By Tools

9.3.3.2.3. By Application

9.3.4. Egypt Online Therapy Services Market Outlook

- 9.3.4.1. Market Size & Forecast
 - 9.3.4.1.1. By Value
- 9.3.4.2. Market Share & Forecast
 - 9.3.4.2.1. By Type
 - 9.3.4.2.2. By Tools
 - 9.3.4.2.3. By Application

10. MARKET DYNAMICS

- 10.1. Drivers
- 10.2. Challenges

11. MARKET TRENDS & DEVELOPMENTS

- 11.1. Recent Developments
- 11.2. Tools Launches
- 11.3. Mergers & Acquisitions

12. GLOBAL ONLINE THERAPY SERVICES MARKET: SWOT ANALYSIS

13. PORTER'S FIVE FORCES ANALYSIS

- 13.1. Competition in the Industry
- 13.2. Potential of New Entrants
- 13.3. Power of Suppliers
- 13.4. Power of Customers
- 13.5. Threat of Substitute Tools

14. COMPETITIVE LANDSCAPE

- 14.1. TalkSpace
 - 14.1.1.1. Business Overview
 - 14.1.1.2. Company Snapshot
 - 14.1.1.3. Tools & Services
 - 14.1.1.4. Current Capacity Analysis
 - 14.1.1.5. Financials (In case of listed)
 - 14.1.1.6. Recent Developments
 - 14.1.1.7. SWOT Analysis

- 14.2. BetterHelp
- 14.3. MDLive
- 14.4. Calmerry
- 14.5. 7 Ci Regain
- 14.6. Breakthrough
- 14.7. Doctor on Demand
- 14.8. Amwell
- 14.9. Pride Counseling
- 14.10. Cerebral

15. STRATEGIC RECOMMENDATIONS

16. ABOUT US & DISCLAIMER

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