

Telemedicine Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028

Segmented By Component (Software & Services, 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 (Telepsychiatry, General Consultations, Teleradiology Telepathology, Others), By End Users (Patients, Providers, Payers), By Region and Competition

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Abstracts

Global Telemedicine Market has valued at USD 87.31 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 15.78% through 2028. Telemedicine is utilized by healthcare organizations, medical offices, and skilled nursing institutions to enhance the efficiency of treatment delivery. Through telemedicine software, clinicians can leverage features such as electronic medical records, artificial intelligence diagnostics, and medical streaming devices to aid in diagnosis and treatment. This advancement has enabled patients with limited access to healthcare services to consult with physicians from the comfort of their homes. Additionally, the introduction of medical streaming gadgets has facilitated aging in place for seniors. Moreover, telemedicine helps minimize the spread of contagious diseases by eliminating the need for patients to expose themselves in crowded waiting rooms. By leveraging the telecommunications network infrastructure, telemedicine enables remote healthcare services such as health evaluations and consultations using video

conferencing, cell phones, and various mediums. This crucial service serves as a lifeline in emergency situations where in-person visits are not feasible. It enables effective communication between patients and healthcare practitioners, ensuring quality care delivery.

Key Market Drivers

Rise in Number Of Chronic Ailments

The prevalence of various chronic diseases, including cardiac arrest, cancer, respiratory disorders, injuries, diabetes, Alzheimer's disease, influenza and pneumonia, kidney disease, and septicemia, among others, is rapidly increasing. This rise in chronic diseases has resulted in an increased need for virtual medical consultations and treatment options. Telemedicine, with its convenience and accessibility, is gaining significant traction as a viable solution.

Furthermore, there is a growing awareness among patients and their family members about the importance of preventing Hospital Acquired Infections (HAI). These infections, such as Bloodstream Infection (BSI), pneumonia, Urinary Tract Infection (UTI), and Surgical Site Infection (SSI), can have severe consequences on patient health. As a result, the demand for telemedicine services continues to grow, as patients seek to minimize their risk of exposure to these infections. The telemedicine market is experiencing substantial revenue growth due to these factors, as more individuals recognize the benefits of virtual consultations and the need for preventive measures in healthcare settings.

Advances In Different Telemedicine Applications

Telemedicine, a revolutionary approach, has transformed numerous sectors within the healthcare industry. Its applications span across radiology, behavioral wellbeing, cardiology, and many others, bringing about significant advancements. This widespread and ever-increasing utilization of telemedicine has not only transformed patient care but also sparked the emergence of innovative business models in the healthcare industry.

Moreover, the telemedicine market is poised for rapid growth, driven by several factors. The aging population and improved accessibility to advanced healthcare services worldwide are key catalysts. The convenience and efficiency offered by telemedicine are attracting an increasing number of healthcare providers and patients, leading to a significant rise in its adoption. As the adoption increases, the potential to bridge the gap

between patients and healthcare professionals becomes more evident, reshaping the future of healthcare delivery.

With the ongoing advancements in technology and the continuous evolution of telemedicine, the future holds even more promise. The integration of artificial intelligence, machine learning, and remote monitoring capabilities opens up new avenues for personalized and proactive healthcare. From virtual consultations to remote patient monitoring, telemedicine is set to revolutionize the way healthcare is delivered, providing timely and efficient care to patients across the globe. Telemedicine's transformative impact on the healthcare industry is undeniable. Its ability to enhance access, convenience, and quality of care has positioned it as a key player in shaping the future of healthcare delivery. As telemedicine continues to evolve and adapt to the changing needs of patients and healthcare providers, it holds immense potential to improve healthcare outcomes and bridge the gap between patients and professionals.

Introduction of AI-based Clinics

In the last few years, there has been a remarkable emergence of artificial intelligence-powered booths in local malls. These innovative booths are equipped with a sophisticated system that includes an intelligent medicine cabinet capable of dispensing over 100 medications. But it doesn't stop there. The AI machine also collects the patient's comprehensive medical history and employs its advanced algorithms to provide a personalized diagnosis strategy. This strategy is then seamlessly transferred to a clinical expert for further evaluation and consultation.

These state-of-the-art booths, aptly named 'One-Minute Clinics', serve as a convenient connection between patients and physicians through the in-house medical team of 'Ping, Doctor'. The beauty of these AI-based clinics is their versatility. They can be set up anywhere, be it a bustling shopping mall, a bustling school, a neighborhood pharmacy, or even a busy highway service station.

Furthermore, the potential of digitally advanced medical devices is being explored to enhance the efficiency and accessibility of these clinics. By seamlessly integrating these devices with mobile phones, patients can effortlessly monitor their health and share vital data with healthcare professionals, leading to a surge in the market growth of these digital health innovations. With such groundbreaking advancements in the field of digital health, the telemedicine industry is poised for positive development and abundant opportunities to flourish on a global scale.

Surge in Telehealth Adoption

Telemedicine offers a wide range of flexible scheduling options, allowing patients to conveniently choose appointment times that perfectly align with their availability. This is particularly beneficial for individuals who face challenges when it comes to taking time off from work or fulfilling other responsibilities for a traditional in-person medical consultation. By opting for telemedicine, patients not only save money on transportation costs and other expenses associated with traveling to a healthcare facility, but they also enjoy the convenience of continuous care without any interruptions, even when they are away from their regular healthcare provider.

Moreover, telemedicine plays a crucial role in bridging the gap in accessing specialized care, especially for patients residing in areas with limited availability of specific medical specialists. The ability to connect with healthcare professionals remotely has significantly improved patient convenience and engagement, thereby acting as a driving force for the growth of the market.

With telemedicine, patients can effortlessly access healthcare services, receive timely medical advice, and maintain regular communication with their healthcare providers from the comfort of their own homes. This transformative approach to healthcare delivery is revolutionizing the way patients receive care, promoting better health outcomes, and ensuring that individuals receive the specialized attention they need, regardless of their geographical location or physical limitations.

Key Market Challenges

High cost for adoption of the technology

Implementing telemedicine services requires a robust technological infrastructure, encompassing various elements such as high-speed internet connectivity, secure data storage, and reliable telecommunication networks. These crucial components ensure seamless and efficient delivery of remote healthcare services. However, it is important to note that the initial setup costs associated with establishing such an infrastructure can be substantial, acting as a potential barrier, particularly for smaller healthcare providers or those operating in resource-constrained areas.

To effectively implement telemedicine solutions, healthcare facilities need to invest in telemedicine-specific equipment and devices, including telemedicine carts for mobile consultations, remote monitoring tools for real-time patient data collection, and video

conferencing systems for virtual doctor-patient interactions. While these technological advancements offer numerous benefits, they can also come with a significant price tag, further adding to the overall cost of adopting telemedicine.

Moreover, healthcare professionals require proper training to effectively utilize telemedicine technology and ensure optimal patient care. This training encompasses not only technical aspects but also focuses on developing effective communication skills in a virtual healthcare setting. Therefore, the process of implementing telemedicine can be time-consuming and costly, which can potentially hamper the growth and widespread adoption of telemedicine services in the healthcare industry.

Despite these challenges, the potential benefits of telemedicine, such as increased access to healthcare, improved patient outcomes, and reduced healthcare costs, make it a promising solution for transforming the delivery of healthcare services. By addressing the barriers and investing in the necessary infrastructure and training, healthcare organizations can harness the full potential of telemedicine to enhance patient care and drive positive changes in the healthcare landscape.

Rapid Increase in Telehealth Care Scams and Frauds

The increasing number of telehealth-care frauds is a grave concern for patients and healthcare professionals alike. Unauthorized sources can engage in false claims, while doctors' names and account information can be exploited for financial gain from patients and insurance companies. The lack of robust data-centric security solutions is a significant factor that hinders the growth of telemedicine market revenue.

The telemedicine and telehealth industries heavily rely on internet connectivity. However, many developing and underdeveloped countries, particularly in Asia and Africa, lack proper connectivity, depriving them of the basic requirement for virtual medical consultation and treatment. Insufficient internet connection is a prominent factor that adversely affects market revenue growth throughout the forecast period. Moreover, consumer concerns regarding security and privacy continue to impede the widespread adoption of telemedicine technology, as healthcare monitoring solutions are susceptible to exploitation and hacking. Additionally, hardware failures, bugs, and power outages can have a detrimental impact on patient health monitoring and diagnosis, posing a threat to healthcare operations. These technological barriers significantly limit the revenue growth of the telemedicine market.

Key Market Trends

Growing Advancements in The Healthcare Industry

The introduction of cutting-edge innovations such as machine learning, Internet of Things (IoT), and artificial intelligence (AI) is set to revolutionize the industry, presenting tremendous opportunities for growth and development. These advancements will not only enhance the efficiency and effectiveness of telemedicine but also pave the way for new and innovative healthcare solutions.

Furthermore, the integration of seamless communication technologies will play a pivotal role in driving the global telemedicine market, as it will enable healthcare providers to offer remote medical services with ease and convenience. This will be particularly beneficial in bridging the gap between urban and rural areas, ensuring that healthcare services are accessible to all. Overall, the convergence of technological advancements and the increasing focus on extending healthcare services to underserved areas are key factors propelling the growth of the global telemedicine market in the foreseeable future.

Corporate Emphasizing on Healthcare Solutions For Employees

With the prevalence of multiple chronic diseases across the globe, along with sedentary lifestyles becoming more common, corporate companies, especially in developed countries, have recognized the need to offer comprehensive healthcare solutions, services, and policies for their employees. This proactive approach not only promotes employee well-being but also presents an opportunity for the telemedicine market to thrive.

Corporate telemedicine solutions are now introducing telehealth services to a large and captive audience, such as the employees of the company. This is particularly beneficial for large corporations with a widespread workforce in different countries or regions. By adopting such healthcare solutions, companies can ensure that their employees have access to quality healthcare regardless of their location.

As the demand for telemedicine services in corporate settings continues to rise, it is anticipated that collaboration, strategic deals, and partnerships between corporates and telemedicine providers will experience significant growth. This synergy will further expand the reach and impact of telemedicine, creating a multitude of opportunities for the market to flourish and positively transform the healthcare landscape.

Segmental Insights

Deployment Mode Insights

Based on the deployment mode, the global telemedicine market is segmented into cloud-based, and on-premises. The cloud-based telemedicine or telecloud segment accounted for the largest share of revenue in 2022. This can be attributed to factors such as increased bandwidth, particularly in extending telemedicine services to rural health populations. Companies are also benefiting from reduced data storage costs as they only pay for the cloud. Additionally, the ease of recovering patients' medical records compared to physical storage, which is susceptible to natural disasters and physical disruptions, further contributes to the popularity of cloud-based telemedicine. The outbreak of the Covid-19 pandemic further underscored the importance of remote monitoring and cloud-based telemedicine as the only available option. For example, in March 2020, over 50 doctors from the Italian Doctors Association lost their lives while treating Covid-19 patients, highlighting the necessity of cloud-based telemedicine or virtual visits. It is worth noting that cloud-based telemedicine is the preferred choice for most individuals compared to conventional methods.

On the other hand, the on-premise segment is anticipated to experience a steady revenue growth rate throughout the forecast period. This can be attributed to factors such as data security, which provides authorized individuals with complete control over data. Furthermore, certain populations, especially in underdeveloped and developing countries, exhibit a preference for face-to-face medical consultations, clinical care, and other conventional methods. These behavioral traits contribute to the revenue growth of the on-premises segment.

End User Insights

On the basis of end users, the global market has been divided into patients, payers, providers, and others. The patients segment dominated the market in 2022. This is because patients seek telemedicine services for various purposes starting from mild or moderate health issues to emergencies. Telemedicine offers patients the convenience of accessing medical care remotely, eliminating the need for physical visits to healthcare facilities. With telemedicine, patients can receive timely medical advice, diagnosis, and treatment from the comfort of their homes.

Market players are recognizing the growing demand for telemedicine services and are expanding their offerings to cater to patient needs. For example, VSee provides a

comprehensive suite of telemedicine solutions, including Telemedicine Software, Carts & Kits, Remote Patient Monitoring Dashboard, and API & SDKs. These solutions are tailored to meet the requirements of various clinical specialties, such as Concierge Medicine, Dermatology, Family Medicine, Internal Medicine, Mental Health, Pediatrics, Physical Therapy, Primary Care, Psychiatry (ER), Radiology, Skilled Nursing Facilities, Speech Therapy, and Urgent Care.

While the patients segment currently dominates the market, the providers segment is expected to register the fastest growth rate over the forecast period. Telemedicine solutions not only enhance the quality of healthcare services but also offer great convenience to healthcare providers. With telemedicine, providers can quickly access patient records, receive improved decision support, streamline workflows, and gain valuable insights through analytics. For instance, eHealth solutions provide healthcare professionals with convenient patient scheduling and efficient data management capabilities, enabling them to deliver better care and improve overall patient outcomes. These benefits are anticipated to drive the increased adoption of telemedicine by healthcare providers in the coming years, further fueling the growth of the telemedicine market.

Regional Insights

North America has emerged as a dominant player in the telemedicine market, owing to several factors. The region boasts a well-developed healthcare infrastructure, advanced technological capabilities, and a favorable regulatory environment that supports the adoption of telemedicine. The high prevalence of smartphones and widespread access to high-speed internet connectivity have also significantly contributed to the growth of telemedicine in North America. Furthermore, the increasing demand for remote healthcare services, particularly in rural and underserved areas, has further propelled the adoption of telemedicine in the region. Additionally, the presence of major telemedicine service providers, substantial investments in research and development, and a supportive reimbursement framework have all played a pivotal role in solidifying North America's dominance in the telemedicine market.

Key Market Players

IBM Corporation

Allscripts Healthcare Solutions Inc.

AMD Global Telemedicine Inc.

Resideo Technologies Inc.

Koninklijke Philips NV

Medtronic PLC

Teladoc Health Inc. (InTouch Technologies Inc.)

Cerner Corporation

CISCO Systems Inc.

SnapMD, Inc.

Report Scope:

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

Telemedicine Market, By Component:

Software & Services

Hardware

Telemedicine Market, By Deployment Mode:

Cloud

On- Premises

Telemedicine Market, By Type:

Tele-Hospitals

mHealth

Tele-Homes

Telemedicine Market, By Technology:

Store & Forward

Real Time

Others

Telemedicine Market, By Delivery Mode:

Audio-Visual

Only Audio

Written

Telemedicine Market, By Application:

Telepsychiatry

General Consultations

Teleradiology Telepathology

Others

Telemedicine Market, By End User:

Patients

Providers

Payers

Telemedicine 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 Telemedicine Market.

Available Customizations:

Global Telemedicine 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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