

North America Connected Health Market Size and Forecast (2021 - 2031)

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Abstracts

The North America Connected Health Market is projected to grow significantly, reaching an estimated US\$ 165,632.1 million by 2031, up from US\$ 30,698.7 million in 2024. This growth represents a remarkable compound annual growth rate (CAGR) of 27.4% from 2025 to 2031.

Executive Summary and Market Analysis

In North America, particularly in the United States and Canada, the connected health market is thriving due to several key factors. High internet penetration, increased smartphone usage, and a growing acceptance of digital health solutions among both healthcare providers and patients are driving this trend. The transition towards value-based care has further accelerated the adoption of connected health platforms, which facilitate more efficient patient monitoring, chronic disease management, and preventative care.

The rising prevalence of chronic conditions, including diabetes, cardiovascular diseases, and obesity, is a significant driver of demand for remote patient monitoring and telehealth services. These technologies enable healthcare providers to deliver timely interventions, enhance patient outcomes, and reduce hospital readmission rates. Additionally, an aging population and the increasing need for long-term care are pushing healthcare systems to adopt digital tools that support continuous, at-home care.

In the United States, the Centers for Medicare and Medicaid Services (CMS) has been instrumental in promoting telehealth services, especially in light of the COVID-19 pandemic. Legislative measures, such as the Telehealth Modernization Act of 2024, have extended telehealth benefits for Medicare recipients, ensuring ongoing access to

remote healthcare services.

Strategic Insights

Market Segmentation Analysis

The North America Connected Health Market can be segmented based on product type, application, and end user:

By Product Type: The market is divided into M-Health Devices and M-Health Services, with M-Health Devices holding the largest market share in 2024.

By Application: The market is categorized into Monitoring Applications, Diagnostic and Treatment, Healthcare Management, Wellness and Prevention, and Others, where Monitoring Applications also held the largest share in 2024.

By End User: The market is segmented into Hospitals and Clinics, Home Monitoring, and Others, with Hospitals and Clinics leading in market share in 2024.

Market Outlook

The increasing prevalence of chronic diseases is a crucial factor driving the growth of the connected health market. Chronic conditions such as diabetes, cardiovascular diseases, and respiratory disorders necessitate continuous monitoring and management to prevent complications and hospitalizations. Connected health solutions, which integrate digital tools, remote monitoring devices, and telehealth services, provide a comprehensive approach to managing these long-term illnesses by enabling real-time tracking and personalized care outside traditional clinical settings.

For patients with chronic diseases, consistent engagement with healthcare providers and adherence to treatment regimens are vital. Connected health platforms facilitate this engagement by offering timely feedback and alerts, empowering patients to take proactive steps in managing their health. For instance, continuous glucose monitoring systems linked to mobile applications allow diabetic patients to track their blood sugar levels throughout the day, reducing the risk of acute events such as hypoglycemia or hyperglycemia. Similarly, remote cardiac monitors enable physicians to monitor arrhythmias or heart failure symptoms in real time, allowing for early intervention before

conditions deteriorate.

Organizations like the American Heart Association have highlighted the transformative potential of remote monitoring technologies in chronic disease care. Their reports indicate that telehealth and connected devices can significantly reduce hospital readmissions and improve patient outcomes by promoting adherence to medication and lifestyle changes. Furthermore, the World Health Organization has underscored the burden of chronic diseases on global health systems, emphasizing the necessity for innovative care models like Connected Health to effectively manage this growing challenge.

As chronic diseases become increasingly prevalent worldwide, the demand for connected health solutions is expected to rise. These technologies not only enhance disease management and patient engagement but also alleviate pressure on healthcare infrastructure, positioning Connected Health as a critical component of future healthcare delivery.

Country Insights

The North America Connected Health Market is segmented by country into the United States, Canada, and Mexico, with the United States holding the largest market share in 2024. The shift in the US healthcare system towards value-based care, along with a growing focus on patient-centric models, is driving the adoption of connected health solutions. Advances in wearable devices, mobile health applications, and improved broadband infrastructure facilitate seamless data exchange between patients and providers. Supportive government policies and reimbursement frameworks further encourage healthcare providers to implement digital health tools. In 2023, the Consolidated Appropriations Act extended telehealth flexibilities, allowing Medicare providers to offer services without geographic restrictions and enabling audio-only consultations. The Drug Enforcement Administration (DEA) also extended telehealth flexibilities for prescribing controlled medications through December 31, 2024. The US Connected Health market is poised for continued innovation, enhancing patient outcomes and streamlining healthcare delivery.

Company Profiles

Key players in the North America Connected Health Market include International Business Machines Corp, OMRON Corp, Abbott Laboratories, Boston Scientific Corp, Medtronic Plc, Koninklijke Philips NV, GE HealthCare Technologies Inc, Apple Inc, Fitbit

LLC, and Samsung Electronics Co Ltd. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to deliver innovative products and increase their market share.

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