



Connected Care in Europe

4th Edition

Connected Care in Europe is a comprehensive report from Berg Insight analysing the latest developments on the telehealth and telecare markets in this region. This strategic research report provides you with 170 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

Connected care revenues in Europe will reach € 7.0 billion by 2027

The ageing population and the increasing prevalence of chronic diseases will be two of the greatest challenges in Europe during this century. It is widely believed that connected care solutions can ease the burden on society by enabling more efficient delivery of care and allowing people to live independently in their homes for longer. Berg Insight's definition of connected care comprises telecare and telehealth solutions that are used for the remote delivery of healthcare and social care services. Today, the most common connected care solution is the traditional telecare alarm, which includes a wearable alarm button that the user presses in the case of an emergency. Next-generation telecare systems are technologically more advanced and can automatically trigger an alarm, for instance if the user leaves home at an unexpected time or forgets to take his or her medicine. Furthermore, next-generation telecare solutions include mobile telecare alarms that users always can carry with them at all times. Telehealth solutions involve connected medical devices and monitoring services that are used for the remote monitoring and management of patients with COPD, chronic heart failure, diabetes, hypertension, asthma, coronary heart disease or chronic kidney disease.

Traditional telecare is the largest and most mature segment of the connected care market with a total of 5.9 million users at the end of 2021. The market for next-generation telecare solutions is entering a growth phase with an estimated total of 2.9 million users in the EU 27+3 countries at the end of 2021, whereas the number of telehealth users reached 1.3 million. The total number of people using connected care solutions amounted to 8.6 million at the end of 2021, as there is an overlap between the three solution categories. The market is forecasted to grow at a CAGR of 12.1 percent during the next six years to reach 17.1 million connected care users by 2027. Berg Insight expects that traditional telecare will be overtaken by next-generation telecare as the largest segment of the connected care market with a forecasted 7.7 million users in 2027. However, traditional telecare will follow with 7.5 million users and telehealth with 5.7 million users at the end of the forecast period.

Connected care revenues in the EU 27+3 countries reached an estimated € 3.6 billion in 2021. This includes revenues from traditional telecare solutions, next-generation telecare solutions and telehealth solutions. The market is expected to grow at a CAGR of 11.8 percent between 2021 and 2027 to reach € 7.0 billion at the end of the forecast period. Traditional telecare solutions accounted for the largest share of the market in 2021 but will not grow as quickly as the next-generation telecare and telehealth markets during the next six years.

The traditional telecare equipment market in Europe is highly consolidated. The two major players – Tunstall and Legrand – hold leading positions in nearly all markets and together account for almost two thirds of telecare unit sales in the region. The next-generation telecare market is on the other hand fragmented. In addition to the leading telecare equipment vendors, companies active in the next-generation market include specialised providers such as Essence Group, Just Checking, Vitalbase and Vivago in activity monitoring; Everon, Libify, Navigil, Oysta Technology, SmartLife Care and Smartwatcher in mobile telecare; and Evondos, Vitavanti, AceAge and iZafe Group in medication compliance monitoring. The telehealth market is similarly a fragmented market that is evolving quickly. Many new start-ups as well as well-established solution providers from adjacent industries are active on the market. Examples include Huma, Luscii, Dignio, Comarch, eDevice and SHL Telemedicine.

The ongoing digitalisation of telephone networks in Europe will require massive replacements of PSTN-based telecare systems in the coming years. At the same time, there is rising interest in new types of solutions that enable social care and healthcare services to be delivered more efficiently. Berg Insight expects that these trends will catalyse the transition to the next generation of connected care solutions. Future caregiving is also anticipated to be predictive in nature by continuously analysing user data and acting on abnormalities. Care providers will work with solutions that rely on data not only from telecare devices, but also from other sources such as smart home sensors and healthcare records. The transition to digital technologies is good news for mobile network operators, as the vast majority of all new connected care systems rely on cellular connectivity. In fact, Berg Insight predicts that the number of cellular connections will grow from around 3.3 million in 2021 to more than 9.1 million in 2027.

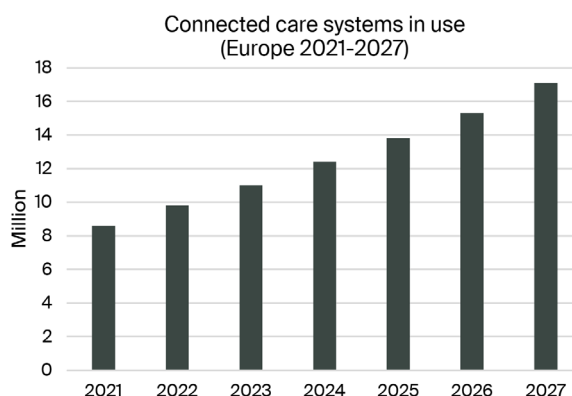


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Glossary

This report will allow you to

Profit from 30 executive interviews with market leading companies.

Identify key players in the connected care ecosystem.

Learn about the latest developments in connected care devices and services.

Understand the dynamics of the European healthcare and social care systems.

Evaluate how the adoption of next-generation solutions is proceeding.

Benefit from expert market analysis including detailed market forecasts lasting until 2027.

The report answers the following questions

- Which are the main verticals within connected care?
- What are the main drivers on this market in Europe?
- How many people are using telecare systems in each European country?
- What are the general technology trends for connected care products?
- Which are the leading telecare equipment providers in Europe?
- How will the connected care market evolve in the next five years?
- How will the markets for telehealth, telecare and smart home solutions converge?
- What is the potential market size for cellular IoT connectivity?



About Berg Insight's IoT market research

Our market reports offer comprehensive information and analysis on key IoT technologies and markets, addressing important concerns including total addressable market, market penetration, market shares, industry landscape, regulatory environment, market trends and forecasts. Our research portfolio today comprises more than 55 items, where each market report focuses on a specific vertical application area or cover horizontal themes. All market reports come with complementary data sets in Excel format that can be easily analysed and converted into tables and charts. We offer a range of different license options together with bundled packages and subscriptions to suit your specific needs.



CONNECTED HEALTHCARE

Connected Care in Europe

How should the mobile industry address the vast business opportunity in the connected care market? Berg Insight forecasts that the number of cellular connections in the connected care market in Europe will increase from 3.3 million in 2021 to more than 9.1 million in 2027. Learn more about how wireless technology can become seamlessly integrated with telehealth and telecare solutions in this 170 page in-depth report.

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Who should read this report?

Connected Care in Europe is the foremost source of information about the telehealth and telecare solution markets in this region. Whether you are an equipment vendor, care provider, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

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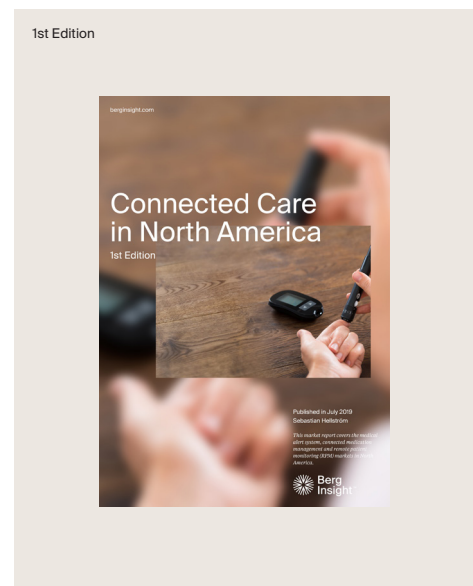
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