



# The Telecare Market in Europe and North America

1st Edition

*The Telecare Market in Europe and North America is a new report from Berg Insight that gives first-hand insights into the adoption of telecare solutions also known as medical alert systems or PERS (personal emergency response systems). This strategic research report from Berg Insight provides you with 150 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.*

# The number of telecare users in Europe and North America reached 14.2 million in 2023

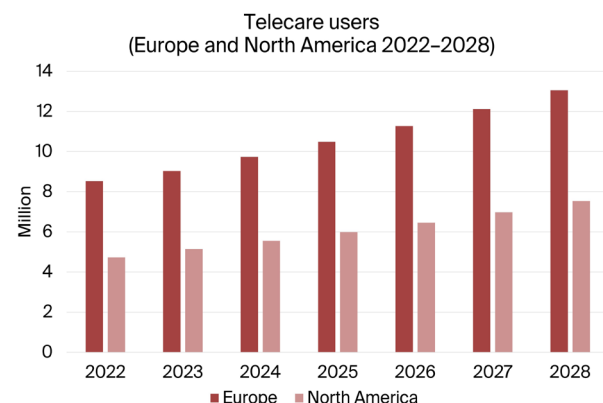
Healthcare technology is reshaping patient care, with emerging digital tools and platforms offering new approaches for diagnosis, treatment and patient engagement. The integration of digital technologies in healthcare is resulting in promising solutions to solve some of the challenges posed by the ageing population and the strained healthcare systems. Berg Insight's definition of telecare solutions, also known as medical alert systems or PERS (personal emergency response systems), is a service aimed for elderly, disabled and vulnerable people to seek help from home in case of an emergency. These solutions can trigger an alarm when the user presses a button or when a passive sensor detects an event out of the ordinary. These systems provide continuous in-home or completely mobile monitoring services and can consist of a range of electronic devices such as personal alarm buttons, motion detection sensors, GPS monitors or fitness devices. The market evolves to include AI solutions that automatically trigger an alarm for instance when a user leaves home at an unexpected time or forgets to take his or her medicine.

Berg Insight estimates that the user base of telecare solutions in Europe region was 9.0 million at the end of 2023. In Europe, the user base is estimated to grow at a CAGR of 7.7 percent to reach more than 13.1 million users at the end of 2028. The market value of telecare solutions reached € 3.5 billion in 2023. The market value is expected to grow at a CAGR of 8.4 percent in the next five years to reach € 5.2 billion at the end of the forecast period. Leading vendors active on the European telecare market are Tunstall, Legrand, TeleAlarm, Careium, Chiptech and Chubb. Tunstall, Legrand and TeleAlarm have strong presence across the European region. Chiptech has its operations in the UK market, meanwhile Careium is a leading market player in the Nordic region and has also presence in the UK. Companies such as Telecom Design, Essence Group, 9Solutions, Oysta Technology (Access Group), Everon and Ascom are key telecare equipment vendors. Enovation, Skyresponse and Azur Soft are the leading providers of telecare monitoring software solutions. Additional significant vendors active in Europe are Tellu, Yorbl, Urmet, Navigil, SmartLife Care, Libify, SmartWatcher, Just Checking and Vivago.

The North American medical alert solution market is estimated to grow from 5.2 million users at the end of 2023 to 7.5 million users at the end of 2028. The penetration of medical alert services in the North American region now corresponds to 7.7 percent of the region's population at the age of 65 years or older. The market value for medical alert solutions in North America reached € 2.7 billion (US\$ 2.9 billion) in 2023. The market value is forecasted to grow to € 4.1 million (US\$ 4.5 billion) by 2028. The North American medical alert

market is served by range of companies providing hardware devices, software platforms and monitoring services. Some companies offer complete end-to-end solutions including Freeus (Becklar Group), Connect America, Mytrex, Numera (Nice North America), MobileHelp and Lively. Another group of companies offering monitoring services and reselling medical alert equipment are Medical Guardian, Life Alert Emergency Response, ADT, Bay Alarm Medical, Aloe Care and ModivCare. Major telecare equipment vendors are Essence Group, Climax Technology, LogicMark and Anelto.

The European and North American market for personal emergency response systems is supported by several trends and developments that will have an impact on the competitive landscape during the forecast period. The silver generation is quickly becoming technologically savvy and open to adopting technology to help in everyday living needs. The deployment of telecare services is a vital means to prevent, reduce or delay the care and support needs. Based on the solution, monitoring can be taken care of by family care providers, municipalities or professional 24/7 monitoring providers. AI has an increasing role in the development of preventive and predictive care models. Solution providers have integrated AI and ML algorithms to analyse the monitoring data to learn about the patient's routine, identify irregularities and expedite the needed assistance. Predictive analytics models assess the user's risk of falling based on historical data and health conditions. The industry is becoming more patient-centric which calls for integrated systems and improved interoperability of connected care solutions. Technology enabled care is a cost-effective solution for monitoring the health of elderly and the vulnerable population offering continuous monitoring. Finally, a convergence between medical alert and remote patient monitoring solutions can be observed as new, integrated and more holistic care solutions emerge.



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## Glossary



## This report will allow you to

**Profit** from numerous executive interviews with market leading companies.

**Learn** about the latest developments in telecare devices and services.

**Study** the strategies of 61 key players in the telecare industry.

**Understand** the market dynamics of the healthcare and social care systems in both regions.

**Evaluate** the business opportunities in the fast-growing mobile telecare device segment.

**Benefit** from expert market analysis including detailed market forecasts lasting until 2028.

**Predict** future market and technology developments.

## The report answers the following questions

- What are the main drivers on this market?
- Which are the leading telecare (medical alert) service and equipment providers?
- What are the general technology trends for telecare solutions?
- How are AI-enabled solutions transforming the telecare industry?
- How can healthcare providers and payers benefit from telecare solutions?
- What are the main differences between the European and North American market?
- How are new reimbursement policies affecting this market?
- How will the telecare market evolve in the next five years?



## 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 70 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

# The Telecare Market in Europe and North America

Berg Insight estimates that the user base of telecare (medical alert) systems in Europe and North America was 14.2 million at the end of 2023. The user base in the two regions is estimated to grow at a CAGR of 7.7 percent to reach more than 20.6 million users at the end of 2028. These solutions are available in both the stationary in-home form factor as well as mobile solutions for the use case when away from home. Learn more about how wireless technology can become seamlessly integrated with these devices in this 150-page in-depth report.

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## Who should read this report?

The Telecare Market in Europe and North America is the foremost source of information about the adoption of telecare solutions also known as medical alert systems or PERS (personal emergency response systems). Whether you are a telecare equipment vendor, telecom operator, healthcare provider, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

AUTHORS

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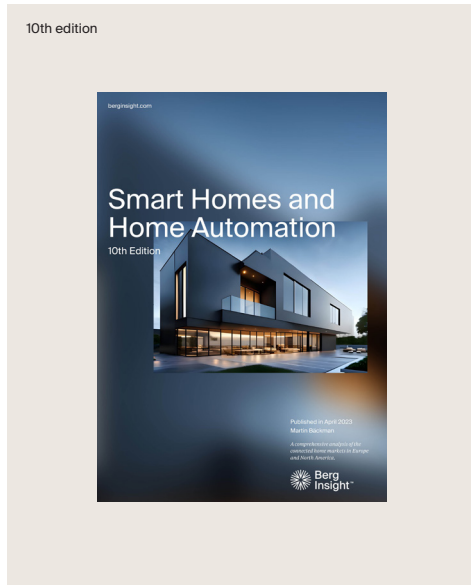


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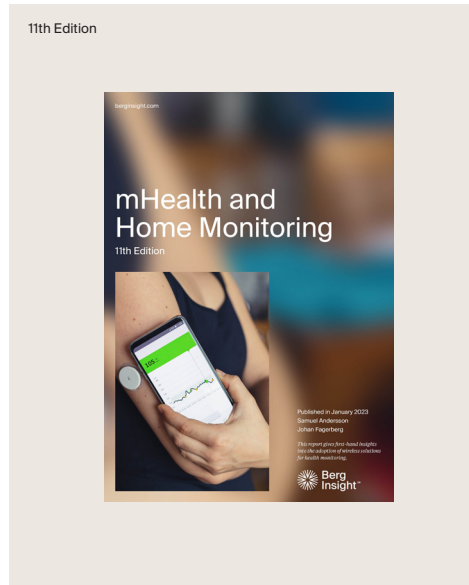


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