



The Telecare Market in Europe and North America

2nd 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 180 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 16.2 million in 2025

In this digital era, artificial intelligence and generative technologies are transforming the tools and platforms for diagnosis, treatment and patient engagement. The rapid adoption and integration of digital technologies in healthcare have resulted in promising solutions to solve some of the challenges posed by the ageing population and 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 that enables elderly, disabled and vulnerable people to seek help from home in the event of an emergency. These solutions can trigger an alarm either when the user presses a button or when sensors detect activity that deviates from normal patterns. PERS 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 detectors, GPS monitors, fitness wearables, smartphones with built-in emergency features and radar-based technologies capable of detecting falls or unusual movements without requiring the user to wear a device. The market is evolving to include AI-driven capabilities that can automatically trigger an alarm in situations such as when a user leaves home at an unusual time or forgets to take his or her medication. AI-enabled systems can also detect unusual inactivity, recognise fall patterns using radar or motion sensors, identify distress through voice analysis or flag behavioural changes that indicate increased risk.

Berg Insight estimates that the user base of telecare solutions in the European market was around 9.7 million at the end of 2025. In Europe, the user base is estimated to grow at a CAGR of 7.8 percent to reach more than 14.1 million users at the end of 2030. The market value of telecare solutions reached € 3.9 billion in 2025. The market value is expected to grow at a CAGR of 7.6 percent in the next five years to reach € 5.6 billion at the end of the forecast period. Leading vendors active on the European telecare market include Tunstall, Legrand, TeleAlarm (Assa Abloy), Careium, and Chubb. Tunstall, Legrand and TeleAlarm have strong presence across the European region. Careium is a leading market player in the Nordic region and also has strong presence in the UK. Chubb Community Care has a strong footprint in the UK market. Companies such as Assa Abloy, Ascom, Attentive (Solem), Beghelli, Chiptech, Climax Technology, Essence Group, MiniFinder, Navigil (Twig Com), Nobi and Telecom Design are key telecare equipment vendors. Enovation (Legrand Care), Skyresponse and Azur Soft are the leading providers of telecare monitoring software solutions. Additional vendors active across the European telecare ecosystem, covering platform software providers, service operators and connected device specialists include 2iC-Care, Access Group, Everon, Genus Care, Just Checking, Libify, Sensio, SmartLife Care, Tellu, Telegrafik, Urmet and Vivago.

The North American medical alert solution market is estimated to grow from 6.5 million users at the end of 2025 to 10.1 million users at the end of 2030. The penetration of medical alert services in the North American region now corresponds to 9.1 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 € 3.4 billion (US\$ 3.7 billion) in 2025. The

market value is forecasted to grow to € 5.1 billion (US\$ 5.6 billion) by 2030. The North American medical alert market is served by a broad range of companies providing hardware devices, software platforms and monitoring services. Some companies offer integrated and platform-led solutions that combine hardware, software and monitoring capabilities into a unified offering. Key examples include Aloe Care Health, Becklar Personal Health & Safety, Connect America, Life Alert Emergency Response, Lively, LogicMark, Mytrex, Medical Guardian and QMedic. Another group consists of monitoring-led service providers that bundle monitoring subscriptions with branded or third-party medical alert equipment focusing on monitoring operations and service delivery. Examples are ADT, Alert1, Bay Alarm Medical and ModivCare. The market includes specialised equipment vendors that design and manufacture medical alert hardware and sensing technologies such as Climax Technology, Essence Group, Numera (Malar Company) and Vayyar Imaging.

The European and North American market for Personal Emergency Response Systems (PERS) 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 enables proactive care that support timely interventions, reducing avoidable hospital admissions while maintaining independence for individuals in their own homes. Based on the solution, monitoring can be taken care of by family care providers, municipalities or professional 24/7 monitoring providers. AI-based solutions have 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 support proactive care by assessing a 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.

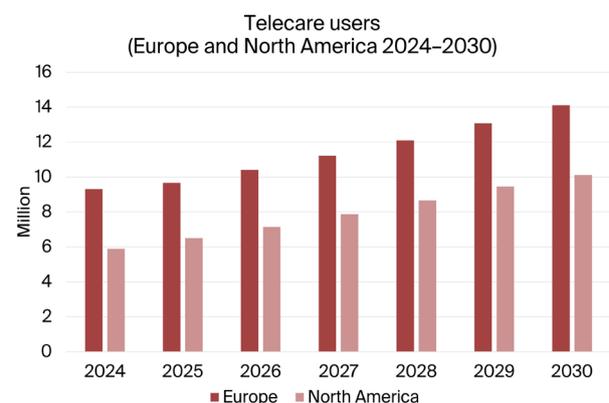


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Glossary

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 69 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 2030.

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 80 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

How should the mobile industry address the vast business opportunity in the telecare market? Berg Insight estimates that the user base of telecare (medical alert) systems in Europe and North America was 16.2 million at the end of 2025. The user base in the two regions is estimated to grow at a CAGR of 8.4 percent to reach more than 24.2 million users at the end of 2030. 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 180-page in-depth report.

PUBLISHED DATE	February 2026
EDITION	2nd
PAGES	180
AUTHORS	Vatsala Raina & Johan Fagerberg

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PDF & EXCEL: 2-10 user license	€ 2 700
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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.

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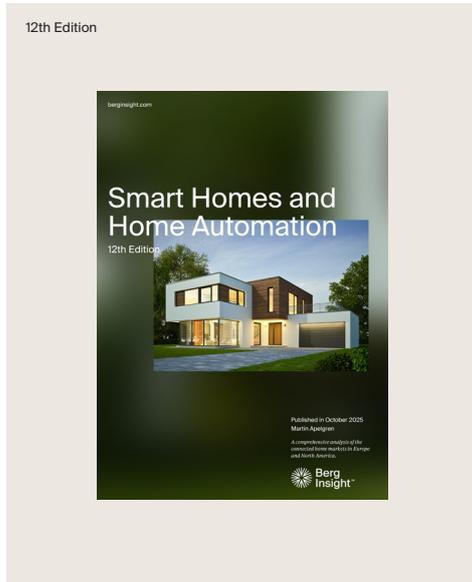


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