mHealth Market Analysis and Segment Forecasts to 2020

Description: The global market for mHealth (Mobile health) is expected to reach USD 49,119.2 million by 2020. Monitoring services is expected to remain the dominant and fastest growing market segment, with market revenue of USD 1,227.5 million in 2012, and an estimated CAGR of 49.7% from 2014 to 2020.

Per capita healthcare expenditures have been increasing, which makes medical services unaffordable for a large percentage of the population. As a result, demand for mobile health is expected to increase considerably over the next six years. In addition to smartphone proliferation, uptake of 3G and 4G networks is expected to increase demand for telemedicine services. Aging population and growing incidences of diseases linked to changing lifestyles have intensified the need for affordable and accessible healthcare. Concerns among users, regarding the safety and privacy of information, along with the need for secure infrastructure, are the key challenges for market participants.

Further Key findings from the study suggest:

- The global market was valued at USD 1,950 million in 2012, and is expected to grow at a CAGR of 47.6% from 2014 to 2020.
- Chronic disease management was the largest contributor to the monitoring services market, with higher demand from developed markets of North America and Europe. The market for post acute care services accounted for 19.5% of the overall monitoring services revenue in 2012. Diagnosis services are more prevalent in developing markets, and growing adoption of these services is expected to considerably augment access to healthcare in these regions.
- Mobile operators accounted for 48% of the overall market in 2012, with majority of their revenue originating from monitoring services such as independent aging solutions. The market for healthcare providers is expected to grow slower than the global average, at an estimated CAGR of 45.1% from 2014 to 2020. Quelling credible concerns among users, along with availability of regulatory support is crucial for driving profitability of industry stakeholders.
- North America dominated the global market, accounting for 33.5% of total revenue in 2012. Highest demand originated from monitoring services, with growing incidences of chronic diseases necessitating the need for mobile health solutions among others. High per capita healthcare expenditure in developed markets is expected to be the key driver for regional growth. Driven by the need for accessible healthcare, the Asia Pacific market is expected to the fastest growing regional market, at an estimated CAGR of 49.1% from 2014 to 2020.
- The market comprises of many stakeholders including mobile operators, device vendors, healthcare providers as well as content players. Companies operating in the market differ on the basis of their offering, and play a key role in overall mHealth adoption. Strategic collaborations and partnerships with healthcare providers, and resolving standardization and interoperability issues are essential for mass acceptance. Industry participants include AT&T, Apple Inc., Google Inc., Allscripts Healthcare Solutions, SoftServe Inc., and Vodafone Group and several others.

For the purpose of this study, the report has segmented the global mHealth market on the basis of services, participants and region:

mHealth Services Outlook (Revenue, USD Million, 2012 - 2020)

- Monitoring Services
  - Independent Aging Solutions
  - Chronic Disease Management
  - Post Acute Care Services
- Diagnosis Services
- Healthcare Systems Strengthening Services
- Others

mHealth Participants Outlook (Revenue, USD Million, 2012 - 2020)

- Mobile Operators
- Device Vendors
mHealth Regional Outlook (Revenue, USD Million, 2012 - 2020)

- North America
  - U.S.
  - Canada
- Europe
  - France
  - Germany
  - Italy
  - Russia
  - UK
- Asia Pacific
  - Australia
  - India
  - China
  - Japan
- RoW

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