

U.S. Continuing Medical Education (CME) Market - Industry Outlook & Forecast 2024-2029

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Report description:

The U.S. continuing medical education market is expected to grow at a CAGR of 5.38% from 2023 to 2029.

The Continuing Medical Education (CME) market in the U.S. represents a vital segment of the healthcare industry dedicated to maintaining and enhancing the competence and performance of healthcare professionals. This market is driven by the ongoing need for medical practitioners to stay updated with the latest medical science, technology, and patient care developments. The U.S. continuing medical education market is characterized by various providers, various educational formats, stringent accreditation standards, and significant regulatory requirements. Furthermore, the market is extensive and multifaceted, encompassing numerous stakeholders, including medical schools, hospitals, professional associations, private educational companies, and online learning platforms. These entities offer a broad spectrum of CME activities such as live events (conferences, workshops, seminars), enduring materials, online courses, journals, and hands-on training sessions. The goal is to provide continuous education that is accessible, relevant, and effective for medical professionals across various specialties.

MARKET TRENDS & DRIVERS

Increasing Involvement of Next-generation Simulation Technology in CME

Next-generation simulation technology, such as virtual reality and augmented reality, is revolutionizing CME by providing immersive, hands-on training experiences. Simulation technology as an educational tool is revolutionizing medical education, including acquiring and maintaining skills and knowledge, integrating technology into a comprehensive clinical curriculum that includes certification and recertification, and adopting proficiency and awareness, practical and competent improvement, and measurement of results. This technology enables healthcare professionals to practice procedures and clinical scenarios in a risk-free environment, enhancing skill acquisition and retention, thus driving growth in the U.S. continuing medical education (CME) market.

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Increased Demand For Mobile Platform Education

The demand for mobile platform education in CME is rising as healthcare professionals seek convenient, on-the-go learning options. Smartphone applications provide interactive learning and constant connection using question-and-answer sections. Several CME providers have proposed interactive methods as a tool for CME. Moreover, smartphone-based online CME methods could offer greater flexibility during training as they improve access for geographically dispersed learners. Also, mobile apps and responsive web-based courses provide flexibility and accessibility, allowing learners to engage with CME content anytime and anywhere, significantly boosting participation and engagement.

Launch of Improved Program and Activity Reporting System (PARS) and CME Passport

Launching the Improved Program and Activity Reporting System (PARS) and CME Passport represents a significant advancement in the U.S. continuing medical education market, offering new efficiency, transparency, and engagement opportunities. These innovative tools streamline reporting and tracking processes, enhance CME programs' quality, and improve healthcare professionals' experience. As the CME landscape continues to evolve, adopting such systems will play a crucial role in supporting the ongoing professional development of healthcare providers and advancing the overall quality of care.

Stringent Regulatory Mandates

Stringent regulatory mandates are pivotal in driving the U.S. continuing medical education market, shaping the quality, relevance, and effectiveness of continuing medical education. By enforcing rigorous accreditation standards, requiring transparency in conflict of interest disclosures, emphasizing outcomes-based education, and ensuring compliance with state and federal regulations, these mandates drive CME providers to deliver high-quality educational programs. The impact of these regulations extends beyond the CME market, contributing to the competence of healthcare professionals, improved patient outcomes, and increased accountability in medical education.

Growing Collaboration Between Accreditation Providers & State Medical Boards

The growing collaboration between accreditation providers and state medical boards drives the U.S. continuing medical education market. This partnership enhances the quality, relevance, and accessibility of CME programs, ensuring that healthcare professionals receive the education they need to provide high-quality care. By leveraging technological advancements, fostering interstate cooperation, and focusing on outcomes-based education, accreditation providers and state medical boards can continue to drive improvements in the CME market, ultimately benefiting healthcare providers and patients. Also, collaboration can lead to the development of more accessible CME opportunities. Accreditation providers and state medical boards can work together to identify barriers to CME participation and implement strategies to overcome them. This may include the creation of online CME platforms, offering scholarships or subsidies, and developing programs that cater to the schedules and needs of busy healthcare professionals.

SEGMENTATION INSIGHTS

INSIGHTS BY DELIVERY MODE

The U.S. continuing medical education market by delivery mode is segmented into classroom training, e-learning, regularly scheduled series (RSS), journals, and others. The classroom training segment holds the largest U.S. market share in 2023. Classroom training, or in-person learning, is a traditional mode of CME delivery that involves face-to-face instruction in a physical setting, such as a conference room, lecture hall, or workshop. It allows real-time interaction, discussion, and hands-on practice with instructors and peers. Further, the e-learning segment encompasses online CME activities, including webinars, virtual

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conferences, online courses, and multimedia modules accessible via computers and mobile devices. It offers 24/7 access, allowing healthcare professionals to learn at their own pace and convenience. It eliminates geographical barriers, reaching a broader audience.

RSS refers to regular CME activities, such as grand rounds, case conferences, and journal clubs, typically organized by healthcare institutions. It provides ongoing, structured education integrated into the regular workflow of healthcare professionals. It is often tailored to the institution's and its staff's needs and interests. It fosters a sense of community and continuous learning within the institution. Further, journals offer CME through published articles, case studies, and research findings, often accompanied by CME quizzes or assessments to earn credits. It provides in-depth, peer-reviewed content that contributes to evidence-based practice. It allows professionals to read and study at their own pace.

Segmentation by Delivery Mode

- Classroom Training
- E-Learning
- Regularly-Scheduled Series (RSS)
- Journals
- Others

INSIGHTS BY PROVIDERSHIP

The directly provided providership segment holds the most significant share of the U.S. continuing medical education market. Direct providership refers to CME programs developed and delivered by a single accredited provider, such as a medical school, professional medical association, hospital, or independent CME company. These providers are responsible for the entire educational activity, from planning and content creation to delivery and evaluation. Direct providers have full control over the educational content and format, ensuring that it meets accreditation standards and is free from commercial bias. This control ensures consistent quality assurance and alignment with the provider's educational goals and mission. Providers can tailor CME programs to meet the specific needs of their target audience, whether it's a particular medical specialty or a general practice. This customization ensures relevance and enhances the learning experience for participants. Furthermore, joint providership involves collaboration between an accredited CME provider and one or more non-accredited entities to deliver educational activities. The accredited provider remains responsible for ensuring the program meets accreditation requirements, while the non-accredited partner(s) contribute resources, expertise, or access to a specific audience.

Segmentation by Providership

- Directly Provided
- Jointly Providership

INSIGHTS BY PROVIDERS

The U.S. continuing medical education market by providers is segmented into NPOs & Physician Membership Organizations (PMOs), publishing/education companies, schools of medicine, hospital/healthcare delivery systems, and others. NPOs and Physician Membership Organizations, such as the American Medical Association (AMA) and the American College of Physicians (ACP), are pivotal in the CME market and dominate the segmental share. These organizations offer a range of CME activities, including conferences, workshops, online courses, and webinars, often tailored to specific medical specialties. They leverage their established reputations, extensive membership bases, and networks to deliver highly relevant and trusted CME by healthcare professionals. These organizations often lead in setting educational standards and advocating for continuous professional development within the medical community.

Furthermore, publishing and education companies like Medscape Education, Wolters Kluwer, and Elsevier are major players in the U.S. continuing medical education market. They provide a broad spectrum of CME materials, including online courses, interactive

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case studies, e-books, and journals, accessible through their platforms. These companies excel in utilizing digital technology to deliver CME content that is flexible and accessible, catering to the needs of busy healthcare professionals. They often collaborate with medical experts and institutions to ensure the content is current and clinically relevant, thus maintaining high education standards. Also, renowned medical schools such as Harvard Medical School, Johns Hopkins University, and Stanford University contribute to the U.S. continuing medical education (CME) market. These institutions offer CME programs that leverage their research expertise, clinical practice, and educational excellence. Their CME offerings are characterized by academic rigor and are often developed by leading experts in various medical fields. The prestige associated with these institutions attracts healthcare professionals seeking high-quality education and advanced knowledge.

Segmentation by Providers

- Non-profit Organizations (NPO) & Physician Membership Organizations (PMO)
- Publishing/Education Company
- School of Medicine
- Hospital/Healthcare Delivery System
- Others

INSIGHTS BY SPECIALTY

The U.S. continuing medical education market by specialty is segmented into oncology, cardiology, infectious diseases, orthopedic, dental, primary care, gastroenterology, general surgery, pediatric, allergy & immunology, endocrinology & metabolism, and others. Each specialty has distinct educational needs and priorities, reflecting the specific challenges and advancements within those fields. CME programs in these areas focus on the latest advancements, evidence-based practices, and emerging technologies, ensuring that healthcare professionals remain proficient and provide high-quality care. In 2023, the oncology segment held the largest U.S. continuing medical education (CME) market share. CME in oncology is a critical component of the ongoing professional development of healthcare providers specializing in cancer diagnosis, treatment, and management. Given the rapid advancements in oncology, CME ensures that oncologists and related healthcare professionals remain updated with the latest research findings, treatment modalities, and best practices.

Segmentation by Specialty

- Oncology
- Cardiology
- Infectious Diseases
- Orthopedic
- Dental
- Primary Care
- Gastroenterology
- General Surgery
- Pediatric
- Allergy & Immunology
- Endocrinology & Metabolism
- Others

REGIONAL ANALYSIS

The U.S. continuing medical education market exhibits regional variations influenced by population density, healthcare infrastructure, and regional healthcare needs. The Southern U.S., encompassing states like Florida, Texas, and Georgia, has a diverse population with varying healthcare needs. This diversity drives a broad range of CME topics and formats to address the

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specific medical conditions prevalent in the region. The region is experiencing rapid growth in healthcare infrastructure, including new medical centers and specialty clinics. This expansion increases the demand for CME programs to train healthcare professionals in cutting-edge technologies and practices.

The Northeast, including states like New York, Massachusetts, and Pennsylvania, is home to some of the country's most prestigious medical institutions and universities. These institutions are key players in the U.S. continuing medical education market, offering high-quality, accredited programs. The dense concentration of medical schools and specialty hospitals in the Northeast drives a strong demand for specialized CME programs. Topics often include advancements in fields like cardiology, oncology, and neurology. The Northeast has a well-established regulatory environment for CME, with stringent accreditation standards ensuring high-quality educational content.

The Central U.S., covering states like Illinois, Ohio, and Michigan, has a mix of urban and rural healthcare settings. CME programs need to cater to a wide range of medical needs and practice environments. There is a growing emphasis on expanding CME access to rural areas in the Central U.S., addressing the need for continuing education among healthcare professionals in less accessible regions. Central U.S. healthcare providers are increasingly adopting new technologies, creating a demand for CME programs focused on innovations in medical technology and telemedicine. Furthermore, the Western U.S., including states like California, Washington, and Colorado, is known for its early technology adoption. This region has a strong presence of digital health and telemedicine innovations, which influence CME trends. The diverse demographics and healthcare needs of the Western U.S. drive demand for CME programs across a wide range of specialties, including emerging fields like integrative medicine and digital health. The region's focus on environmental health issues, such as air quality and climate change, shapes CME content to address these unique challenges.

Segmentation by Geography

- Southern
- Northeast
- Central
- Western

VENDOR LANDSCAPE

The U.S. continuing medical education market is a dynamic and competitive landscape characterized by diverse providers and platforms, evolving educational needs, and rapid medical knowledge and technology advancements. Understanding the competitive landscape of the CME market is essential for stakeholders, including healthcare professionals, CME providers, and educational institutions. Further, prestigious academic medical centers and universities, such as Harvard Medical School, Mayo Clinic, and Johns Hopkins University, are major players in the U.S. continuing medical education market. These institutions offer a wide range of CME programs that leverage their expertise in medical research, clinical practice, and educational excellence. Their reputation and resources provide a competitive edge in attracting healthcare professionals seeking high-quality education. Moreover, professional associations, including the American Medical Association (AMA), the American College of Physicians (ACP), and the American Academy of Family Physicians (AAFP), play a significant role in the CME market.

CME Providers

- AcademicCME
- Acadoodle
- AffinityCE
- Albert Einstein College of Medicine
- AMA Ed Hub
- AMDA ? The Society for Post-Acute and Long-Term Care Medicine:
- American Academy of Allergy, Asthma & Immunology
- American Academy of Family Physicians

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- []American Academy of Sleep Medicine
- []American College of Cardiology
- []American Medical Seminars
- []American Society for Metabolic and Bariatric Surgery
- []Antidote Education Company
- []AO North America
- []Aspirus
- []AXIS Medical Education
- []Ballad Health
- []Baptist Health South Florida
- []Baylor College of Medicine
- []BorderRAC
- []Boston University School of Medicine
- []Brody School of Medicine East Carolina University
- []Bryan Health
- []Bureau of Infectious Disease and Laboratory Sciences
- []Cine-Med
- []CME Outfitters
- []CME Procedures
- []Continuing Education Company
- []COPIC Insurance Company
- []Curi
- []Current Reviews
- []EB Medicine
- []Essential CME
- []EXCEL CME
- []Florida Psychiatric Society
- []Forefront Collaborative
- []Georgia Chapter of the American College of Cardiology
- []Great Valley Publishing Company
- []Greeley Company
- []Haymarket Medical Education
- []HonorHealth
- []Indiana University School of Medicine
- []Kenes Group
- []Lowell General Hospital
- []MagMutual
- []Med Learning Group
- []Medicus
- []Med-IQ
- []MedScape
- []MLMIC Insurance Company
- []NORCAL Mutual Insurance Company
- []Oakstone CME
- []Opus Medicus
- []Orthopaedic Trauma Association
- []Penn Medicine Lancaster General Health

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- []PESI Healthcare
- []Relias
- []Research To Practice (RTP)
- []Rockpointe Corporation
- []Salus Global
- []Stanford Medicine
- []The Carlat CME Institute
- []The Center for Forensic Psychiatry
- []The MEDICAL MUTUAL Liability Insurance Society of Maryland
- []The Society for Simulation in Healthcare
- []Tower Health
- []University of California, Irvine
- []University of North Dakota
- []UpToDate
- []World Class CME

KEY QUESTIONS ANSWERED:

- 1.[]Which region dominates the U.S. continuing medical education market share?
- 2.[]How big is the U.S. continuing medical education market?
- 3.[]What are the significant trends in the U.S. continuing medical education market?
- 4.[]What is the growth rate of the U.S. continuing medical education market?
- 5.[]Which specialty segment holds the most prominent share of the U.S. continuing medical education market?

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