

## **Global Mental Health Technology Market Research Report 2025-2030**

Market Report | 2025-08-14 | 135 pages | Arizton Advisory & Intelligence

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### **Report description:**

The global mental health technology market is expected to grow at a CAGR of 12.58% from 2024 to 2030.

### **MENTAL HEALTH TECHNOLOGY MARKET NEWS**

- On June 4, 2025, Iris Telehealth and Holmusk announced a strategic partnership to integrate their advanced AI platforms, combining telepsychiatry services with real-world behavioral health data and localized insights to enhance and personalize mental health care delivery.
- On April 22, 2025, Lyra Health, one of the leaders in workforce mental health solutions, introduced Lyra Empower, an AI-powered platform designed to deliver high-quality, transformative mental health care globally. The platform integrates advanced technology with clinical excellence to support HR leaders, members, and care providers.

### **KEY TAKEAWAYS**

- By Technology: The software & services segment accounted for the largest market share of over 70%.
- By Age: The teenager segment shows the highest growth of 13.05% during the forecast period.
- By Application: The clinical mental health management segment dominates and holds the largest market share in 2024.
- By End-User: The individual consumers segment holds the largest share of the global mental health technology market.
- By Geography: In 2024, North America accounted for a share of over 50% of the global mental health technology market.
- Growth Factor: The global mental health technology market is set to grow due to rising mental health awareness and supportive government & NGO initiatives.

### **MENTAL HEALTH TECHNOLOGY MARKET TRENDS**

AI-driven mental health solutions, including chatbots and virtual therapists, are revolutionizing the way individuals access mental healthcare. These tools offer 24/7 support, enabling users to receive immediate, judgment-free guidance on issues ranging from

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stress to depression. By leveraging natural language processing and machine learning, AI platforms can deliver personalized, data-informed interactions that mimic human conversation, helping bridge the gap between demand and availability of mental health professionals.

Teletherapy and virtual counseling have gained widespread acceptance, particularly following the global shift toward remote services during the COVID-19 pandemic. These platforms offer greater flexibility and accessibility, allowing patients to connect with licensed therapists from the comfort of their homes. This model is especially beneficial for individuals in rural or underserved areas.

Wearable devices such as the Apple Watch, Fitbit, and Whoop are increasingly being integrated into mental health care by monitoring physiological indicators like sleep patterns, heart rate variability (HRV), and stress levels. These metrics can offer early signals of mental health changes and enable real-time feedback for both users and clinicians. The growing synergy between wearables and mental health platforms helps foster proactive mental well-being management and supports data-driven treatment approaches.

The mobile app ecosystem for mental health has expanded rapidly, with apps like Headspace, Calm, Moodpath, and Sanvello gaining millions of users worldwide. These platforms offer guided meditation, mood tracking, cognitive behavioral therapy (CBT) tools, and personalized mental health plans. Their ease of use, affordability, and on-demand access make them an attractive option for individuals seeking daily support and self-care solutions.

## MENTAL HEALTH TECHNOLOGY MARKET DRIVERS

Increasing awareness of mental health as a crucial component of overall well-being has significantly fueled demand for digital mental health solutions. Public discourse, social media advocacy, and corporate wellness initiatives have helped reduce stigma and encourage proactive mental health care. This cultural shift has empowered individuals to seek support earlier and more frequently, creating a receptive market for mental health apps, teletherapy platforms, and AI-driven self-help tools.

Governments and international organizations are actively promoting mental health through funding, policy support, and public health campaigns. For example, the World Health Organization (WHO) has launched global mental wellness initiatives, while countries like the U.K. and Australia have invested in digital mental health platforms through public healthcare systems.

Non-governmental organizations (NGO) also collaborate with tech providers to deploy tools in underserved regions. These efforts legitimize digital mental health technologies and accelerate their adoption on a systemic level.

The widespread availability of smartphones and affordable internet has been a major enabler for the mental health technology market. With billions of people connected globally, many in remote or resource-constrained areas, digital platforms now offer scalable, on-demand access to support. This infrastructure allows mobile apps, virtual therapy, and wearable-integrated tools to reach diverse populations, making mental health care more inclusive and continuous.

The global rise in mental health disorders, such as anxiety, depression, and stress-related conditions, has created an urgent need for scalable interventions. This growing burden has overwhelmed traditional healthcare systems and propelled the development and adoption of technology-driven solutions that can meet rising demand more efficiently.

## INDUSTRY RESTRAINTS

The mental health technology sector faces significant regulatory uncertainty due to inconsistent standards across regions and the absence of clear, comprehensive frameworks governing digital mental health tools. This lack of uniform regulation creates confusion for developers and clinicians alike, leading to uneven product quality and varied user protections.

Mental health apps and digital platforms collect highly sensitive personal data, making privacy and security a top concern. Inadequate data protection can erode user trust and lead to regulatory violations. The fear of breaches or misuse of personal mental health information poses a significant barrier to widespread adoption.

## MENTAL HEALTH TECHNOLOGY MARKET SEGMENTATION INSIGHTS

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## INSIGHTS BY TECHNOLOGY

The global mental health technology market by technology is segmented into software & services and hardware. The software & services segment accounted for the largest market share of over 70%. This segment includes a broad range of digital tools such as mental health monitoring apps, mood trackers, AI-based chatbots, virtual therapists, and platforms for therapy, meditation, and digital cognitive behavioral therapy (CBT). On the services side, telepsychiatry, remote counseling, and subscription-based mental health care models have rapidly expanded. This segment is largely categorized into software solutions like mental health apps, digital therapy platforms, AI tools, and service offerings like telepsychiatry, subscription-based therapy, and managed care. Mental health tracking & mood monitoring apps enable users to record emotions, mood fluctuations, sleep habits, and stress levels via self-reporting or passive data gathering via wearables and smartphones. Apps such as Moodpath and Youper integrate mood journaling and CBT methods with personalized feedback.

Artificial intelligence chatbots such as Woebot, Wysa, and Tess mimic therapy conversations through the use of natural language processing (NLP) and machine learning. The virtual mental health coaches are available 24/7 and provide evidence-based advice, particularly for individuals with limited access to human therapists.

## INSIGHTS BY AGE

The global mental health technology market by age is categorized into adults, geriatric, and teenagers. The teenager segment shows the highest growth of 13.05% during the forecast period. The teenage demographic (age below 18) has become one of the most critically affected age groups in the global mental health landscape. According to the WHO, in 2024, mental health conditions accounted for 15% of the global burden of disease and injury among people aged 10-19. Common issues include anxiety, depression, self-harm, eating disorders, and suicidal ideation. This escalating crisis has pushed governments, tech companies, and healthcare providers to develop targeted mental health technologies for adolescents. The result is an increasing number of youth-focused apps, therapy platforms, and digital tools entering the market, offering scalable support for emotional and behavioral health challenges.

Increasing academic expectations, social media-driven comparison, bullying (both offline and cyberbullying), and pressure to perform have all been linked to growing anxiety and depression in teens. Mental health is now more openly discussed among younger generations, due to social media. Teens are among the most active users of smartphones and digital platforms. This makes mobile apps and online therapy an ideal channel for delivering mental health interventions, hence it is boosting the market.

## INSIGHTS BY APPLICATION

Based on the application, the clinical mental health management segment dominates and holds the largest market share in 2024. The clinical mental health management segment focuses on the use of technology to support the diagnosis, treatment, and ongoing management of clinically recognized mental health disorders. It includes digital tools and platforms designed to address conditions such as depression, anxiety, cognitive and behavioral disorders (e.g., ADHD, OCD), substance use and addiction disorders, and severe mental illnesses (SMI) like schizophrenia or bipolar disorder. The use of telepsychiatry and AI-powered symptom tracking tools has surged, especially post-COVID-19. These innovations are helping clinicians monitor patients remotely, personalize treatments, and intervene early when relapses or emergencies arise.

There is growing awareness that managing stress and emotional well-being proactively can reduce the risks of chronic diseases, improve sleep quality, and enhance overall life satisfaction. This has positioned mental wellness tools as key components of holistic digital health ecosystems.

The world is facing a critical shortage of trained mental health professionals. Digital tools help bridge this gap by providing scalable and accessible mental health support through chatbots, virtual care, and AI-driven diagnosis. Clinical mental health tools are increasingly being integrated into chronic care management platforms, creating a more holistic and efficient care approach.

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## INSIGHTS BY END-USER

By end-user, the individual consumers segment holds the largest share of the global mental health technology market. Individual consumers represent a large and diverse segment of the mental health tech market, comprising people seeking support for conditions such as anxiety, depression, stress, or sleep disorders without necessarily going through formal healthcare channels. This group includes tech-savvy users adopting self-guided apps, AI chatbots, mindfulness platforms, and virtual therapy services to manage mental well-being independently.

Wearables are gaining popularity for mental health monitoring, especially in stress and sleep management. Devices like the Apple Watch, Fitbit Sense, Oura Ring, and Muse Headband measure physiological signals such as heart rate variability (HRV), sleep patterns, skin temperature, and electrodermal activity, which are indirect indicators of stress and anxiety.

Increased openness towards talking about mental health, particularly among Millennials and Gen Z, has made the utilization of digital platforms for emotional assistance commonplace. International awareness campaigns, social media personalities, and celebrity partnerships have further decreased stigma, thus promoting the market among individual shoppers.

## MENTAL HEALTH TECHNOLOGY MARKET GEOGRAPHICAL ANALYSIS

In 2024, North America accounted for a share of over 50% of the global mental health technology market. North America's mental health technology market is flourishing with widespread adoption, commercialization, and competitive saturation. Cognitive behavioral therapy (CBT) digital platforms like Woebot, SilverCloud Health, and other FDA-approved tools have gained widespread adoption as standalone mental health support systems and add-on tools to traditional therapy.

A breakthrough policy change took place in July 2024, when Medicare introduced new codes for payment to compensate providers and developers for offering digital mental health treatments, such as app-based CBT, AI-facilitated therapy aids, and remote mental well-being courses. The step was taken considering the increasing body of clinical evidence that demonstrates how digital therapeutics can equal or surpass conventional interventions for some behavioral disorders.

There is a growing public recognition of mental health as a critical component of overall well-being in North America. Rising cases of depression, anxiety, stress, PTSD, and burnout, especially post-COVID-19, have led to a surge in demand for accessible, stigma-free mental health support.

The APAC region is witnessing significant growth in the global mental health technology market, with the fastest-growing CAGR of 13.18% during the forecast period. APAC has become a hotspot for mental health tech startups, especially in countries like Singapore, India, Japan, and South Korea. Startups are leveraging AI, chatbots, digital CBT, and behavioral analytics to create engaging and personalized tools.

The widespread adoption of smartphones and increasing internet connectivity across APAC, including in rural and semi-urban areas, is enabling the delivery of mental health services via mobile platforms. For example, India and Southeast Asia have millions of new internet users annually, making mental health apps and teletherapy accessible to large populations.

One of the principal drivers of APAC mental health tech uptake is smartphone penetration and internet use. China, India, South Korea, and Indonesia alone have a combined population of several hundred million web users who increasingly turn to mobile apps to cope with emotion, stress, and guided self-help.

In much of APAC, mental illness remains a taboo subject, particularly among elderly segments. The stigma has traditionally acted as a deterrent for people to seek help. But the younger generation (18-35 age group) is challenging this trend with a larger receptivity to experimenting with self-help tools, AI chatbots, and online counseling platforms. As the tide of awareness increases, APAC is all set to rank as one of the world's fastest-growing mental health tech markets.

## MENTAL HEALTH TECHNOLOGY MARKET VENDOR LANDSCAPE

The global mental health technology market report consists of exclusive data on 32 vendors. The market is moderately to highly competitive, with the presence of a diverse mix of players ranging from large tech giants and healthcare platforms to startups and specialized mental health providers. The competitive environment is shaped by continuous technological innovation, strategic

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partnerships, and increasing investment in mental health-related digital tools. Vendors compete primarily on factors such as user engagement, clinical effectiveness, AI capabilities, etc. Woebot and Wysa have integrated natural language processing (NLP) and machine learning to personalize user interactions.

A key trend in the mental health tech space is the growing enterprise adoption of digital wellness solutions. Platforms like Headspace Health are expanding into the corporate sector with offerings like "Headspace for Work," reflecting rising employer demand for scalable, preventive mental health support for employees. Due to growing demand for accessible and scalable mental health solutions, vendors are increasingly focusing on mental health apps, teletherapy platforms, AI chatbots, wearables, etc.

#### Key Vendors

- Apple
- Amwell
- BetterHelp
- Calm
- Google
- Headspace
- Lyra Health
- Talkspace

#### Other Prominent Vendors

- Advanced Data Systems (ADS)
- AdvancedMD
- Ava Mind
- Brightline
- Cerebral
- Compulink
- Eleanor Health
- Iris?Telehealth
- Kintsugi Mindful Wellness
- Meru?Health
- Modern?Health
- Muse
- Oracle
- Ouraring
- OxfordVR
- Qualifacts
- SonderMind
- Spring Care
- Talkiatry
- Unmind
- Woebot Health
- Workit Health
- Wysa
- XRHealth

#### SEGMENTATION & FORECASTS

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- By Technology
- Software & Services
- Hardware
- By Age
- Adults
- Geriatric
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- By Application
- Clinical Mental Health Management
- Preventive & Wellness-Oriented Mental Health Support
- By End-User
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- Middle East & Africa
- Turkey
- Saudi Arabia
- South Africa

**KEY QUESTIONS ANSWERED:**

- 1.□How big is the global mental health technology market?
- 2.□Who are the major players in the global mental health technology market?
- 3.□What is the growth rate of the global mental health technology market?
- 4.□Which region dominates the global mental health technology market?
- 5.□What are the key drivers of the global mental health technology market?

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