

Telemedicine - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Telemedicine Market Analysis

The Telemedicine market size is estimated at USD 196.37 billion in 2025 and is projected to reach USD 376.12 billion by 2030, reflecting a robust CAGR of 13.88% during the forecast period. This double-digit expansion signals a decisive transition from pandemic-induced uptake toward the permanent embedding of virtual care as a standard clinical touchpoint. Payers, providers, and policymakers now treat digital health infrastructure as foundational to resilient care delivery, prompting investments in interoperability, cybersecurity, and remote diagnostics. The Telemedicine industry is therefore entering a scale-up phase in which platform breadth, specialist coverage, and data analytics depth determine procurement decisions. One observable outcome is that health systems with mature virtual-first operating models consistently report higher patient-engagement metrics, placing them in a strong position to capture incremental Telemedicine market share over the next five years.

Global Telemedicine Market Trends and Insights

Physician Shortages Driving Virtual Care Adoption

The widening global physician shortage is accelerating telemedicine market adoption as health systems struggle to meet rising patient demand. The Association of American Medical Colleges Report, released in March 2024, projected a United States physician deficit of up to 86,000 by 2036, with one in five current physicians aged 65 or older approaching retirement. Rural areas feel the strain most acutely, where 46.3% of U.S. counties lack a practicing cardiologist, resulting in 31% higher cardiovascular

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

risk for residents, as per an article by Medicus Healthcare Solutions, published in August 2024. Telemedicine platforms mitigate these gaps by enabling specialists to serve multiple facilities remotely, extending reach without physical relocation. Health networks reconfigure on-call rotations to include virtual coverage, subtly improving appointment availability and reducing wait times. A downstream effect of these virtual hubs is improved care continuity because multidisciplinary teams can incorporate remote patient monitoring data during daily rounds. The integrated approach not only elevates quality but also cements telemedicine as an indispensable lever in long-range workforce planning.

Value-Based Care Models Incentivizing Virtual Visits

Healthcare payers are weaving telemedicine into value-based care contracts, recognizing its potential to lower costs while boosting outcomes. By 2027, an estimated 90 million covered lives are expected to fall under value-based arrangements, marking a pivotal shift away from fee-for-service. Financial incentives now reward providers that leverage virtual care to suppress emergency-department visits and prevent avoidable admissions. Telemedicine's integration is especially pronounced in chronic-disease management, where continuous remote monitoring supports earlier intervention and medication adherence. Payer confidence in virtual-first models has led to stable reimbursement parity for qualified video and audio visits, effectively locking digital pathways into standard benefit designs. The linkage between payment incentives and platform usability is compelling health systems to refine user interfaces for both clinicians and patients, a subtle design focus that reinforces growth in the telemedicine market share.

Cybersecurity Vulnerabilities Threatening Market Growth

Heightened data privacy and cybersecurity risks are emerging as a significant barrier to telemedicine adoption, eroding stakeholder trust and increasing compliance costs. Healthcare organizations experienced a 77% decline in Internet Protocol reputation security, exposing them to malware and phishing attacks, as per an article published by PureDome in January 2024. The expansion of connected medical devices introduces additional vulnerabilities, with watchdogs urging better coordination between the United States Food and Drug Administration and cybersecurity agencies to address outdated software, as per an Axios article from January 2024. Providers now allocate larger portions of digital-health budgets to encryption and endpoint security, driving up the total cost of ownership. Smaller clinics often postpone platform upgrades because of these expenses, slowing the telemedicine market penetration in underserved areas. Industry leaders who embed advanced threat-detection protocols differentiate themselves during vendor selection, illustrating how security prowess is evolving into a decisive purchasing criterion across the Telemedicine industry.

Other drivers and restraints analyzed in the detailed report include:

Smartphone Penetration Expanding Telemedicine's Reach / Chronic Disease Management Driving Remote Monitoring Growth / Digital Divide Limiting Equitable Access /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Tele-hospitals held 41.3% of the Telemedicine market share in 2024, while mHealth is projected to expand at a 23.5% CAGR through 2030, outpacing traditional tele-hospitals and tele-homes. Consumers increasingly integrate wearables that monitor heart rate, sleep patterns, and blood-oxygen levels into everyday health routines, generating continuous data streams that enrich clinical dashboards. This shift moves healthcare from episodic interaction to ongoing lifestyle management, a trend that resonates with digital-native demographics. Providers leverage mHealth data for population-health stratification, allowing earlier outreach to high-risk cohorts. In emerging markets, mobile-first strategies help health systems leapfrog infrastructure constraints,

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

demonstrating mHealth's outsized influence on the telemedicine industry expansion. As more devices gain regulatory clearance for medical use, interoperability with electronic health records improves, reinforcing mHealth's contribution to the telemedicine market share.

Services control roughly 66.2% of the telemedicine market share in 2024, with telepsychiatry expected to grow at a 28.2% CAGR through 2030. The mental-health boom and virtual delivery's suitability explain the momentum, as physical examinations are less central to psychiatric evaluation. Avel eCare's acquisition of Amwell Psychiatric Care in January 2025 underscores consolidation aimed at nationwide coverage. Behavioral health already accounts for 57% of outpatient visits conducted via telemedicine, illustrating patient preference for virtual sessions. Payers increasingly cover telepsychiatry at parity, providing financial stability to providers and encouraging continued platform investment. The expansion of telepsychiatry, therefore, stands as a major driver of the overall Telemedicine market size growth.

Telemedicine Market is Segmented by Type (Tele Hospitals, Tele Homes, and MHealth), Component (Products and Services), Mode of Delivery (On-Premises Delivery, Cloud-Based Delivery, and More), Deployment Model (Real-Time, Store-And-Forward, More), End User (Providers, Payers, and More), and Geography (North America, Europe, Asia-Pacific, and More). The Market Sizes and Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America leads global Telemedicine market share at 37.8% in 2024, supported by robust broadband infrastructure and favorable reimbursement policies. As of October 2024, forty-three states and the District of Columbia had enacted telehealth private-insurance laws, with forty-one states requiring coverage parity, according to the National Conference of State Legislatures. Although key Medicare telehealth flexibilities are only extended through March 2025, private insurers continue hard-wiring virtual-first benefits into contracts. Academic medical centers spin off telehealth innovations into commercial ventures, adding entrepreneurial vigor. Cross-state licensure compacts expand clinician availability across regions, reinforcing the Telemedicine market size leadership of North America.

Asia-Pacific is the fastest-growing region, with a projected 19.6% CAGR, driven by rising healthcare investment, smartphone penetration, and supportive government initiatives. India's eSanjeevani program demonstrates scalable public-private collaboration, operating two models—provider-to-provider and patient-to-doctor—to broaden rural access, as per the Center for Global Digital Health Innovation, published in July 2024. Private capital flows toward hospital-at-home start-ups and AI-based triage chatbots, signaling investor belief in decentralized care. Multilingual support and low-bandwidth video protocols address cultural and infrastructural diversity, ensuring scalable deployment across diverse geographies. The rapid proliferation of digital health services positions Asia to gain Telemedicine market share at the expense of slower-moving mature regions.

Europe exhibits steady growth, supported by universal healthcare systems and a strong regulatory framework. France's Nouvelle-Aquitaine telemedicine initiative, which equipped 78% of nursing homes with telehealth capabilities, fosters collaboration among establishments and demonstrates the region's innovative deployment models. The General Data Protection Regulation imposes stringent data-handling rules, increasing compliance costs yet enhancing patient trust. The European Health Data Space aims to harmonize interoperability protocols across member states, simplifying certification for telehealth vendors. These regulatory alignments create predictable conditions that attract investment and stabilize Telemedicine market size expansion in the continent.

List of Companies Covered in this Report:

Teladoc Health / Amwell (American Well Corp.) / Koninklijke Philips / Cerner Corp. (Oracle Health) / MDLive Inc. (Evernorth) / Aerotel Medical Systems / IBM (Watson Health) / Allscripts / AMD Global Telemedicine / SOC Telemed / Resideo Technologies /

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Medtronic / SHL Telemedicine Ltd. / Cisco Systems / GE Healthcare / Siemens Healthineers / Honeywell International / Doctor On Demand Inc. / Babylon Holdings Ltd. / Ping An Good Doctor / Practo Technologies Pvt. Ltd. / Zuellig Pharma (Hello Health Group) /

Additional Benefits:

 The market estimate (ME) sheet in Excel format /
3 months of analyst support /

Table of Contents:

1 Introduction

1.1 Study Assumptions & Market Definition

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

4.2.1 Widening Global Physician Shortage and Patient Demand for Convenient, On-Demand Care

4.2.2 Payer Shift Toward Value-Based Reimbursement and Cost-Containment Programs That Reward Virtual Visits

4.2.3 Mass Adoption of Smartphones and Affordable Broadband in Emerging Economies Expanding Addressable User Base

4.2.4 Rising Chronic-Disease Burden and Aging Populations Requiring Continuous, Low-Cost Remote Management

4.2.5 Progressive Regulatory Reforms in Granting Reimbursement Parity And Interstate/ Cross-Province Practice Rights

4.2.6 Rapid Innovation in Connected Diagnostic Devices (RPM, Wearables) Seamlessly Integrating With Telemedicine Platforms

4.3 Market Restraints

4.3.1 Heightened Data-Privacy and Cybersecurity Risks Eroding Stakeholder Trust and Increasing Compliance Costs

4.3.2 Digital Literacy and Infrastructure Gaps Among Rural, Elderly, and Low-Income Populations Slowing Adoption Curves

4.3.3 Fragmented Global Regulatory and Licensure Landscape Inhibiting Scalable Cross-Border Service Delivery

4.3.4 Persistently Inconsistent Telehealth Reimbursement Policies Across Public and Private Payers Affecting Revenue Visibility

4.4 Regulatory Outlook

4.5 Technological Outlook

4.6 Investment & Funding Trends Analysis

4.7 Porter's Five Forces Analysis

4.7.1 Threat of New Entrants

4.7.2 Bargaining Power of Buyers

4.7.3 Bargaining Power of Suppliers

4.7.4 Threat of Substitute Products

4.7.5 Intensity of Competitive Rivalry

5 Market Size & Growth Forecasts (Value)

5.1 By Type

5.1.1 Tele-hospitals

5.1.2 Tele-homes

5.1.3 mHealth (Mobile Health)

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.2 By Component
 - 5.2.1 Products
 - 5.2.1.1 Hardware
 - 5.2.1.2 Software
 - 5.2.1.3 Other Products
 - 5.2.2 Services
 - 5.2.2.1 Telepathology
 - 5.2.2.2 Telecardiology
 - 5.2.2.3 Teleradiology
 - 5.2.2.4 Teledermatology
 - 5.2.2.5 Telepsychiatry
 - 5.2.2.6 Telestroke
 - 5.2.2.7 Tele-ICU
 - 5.2.2.8 Other Services
- 5.3 By Mode of Delivery
 - 5.3.1 On-premise Delivery
 - 5.3.2 Cloud-based Delivery
 - 5.3.3 Web-based Delivery
- 5.4 By Deployment Model
 - 5.4.1 Real-time (Synchronous)
 - 5.4.2 Store-and-Forward (Asynchronous)
 - 5.4.3 Remote Patient Monitoring
- 5.5 By End User
 - 5.5.1 Providers (Hospitals & Clinics)
 - 5.5.2 Payers
 - 5.5.3 Patients (Direct-to-Consumer)
 - 5.5.4 Employer Groups & Government Agencies
- 5.6 Geography
 - 5.6.1 North America
 - 5.6.1.1 United States
 - 5.6.1.2 Canada
 - 5.6.1.3 Mexico
 - 5.6.2 Europe
 - 5.6.2.1 Germany
 - 5.6.2.2 United Kingdom
 - 5.6.2.3 France
 - 5.6.2.4 Italy
 - 5.6.2.5 Spain
 - 5.6.2.6 Rest of Europe
 - 5.6.3 Asia Pacific
 - 5.6.3.1 China
 - 5.6.3.2 Japan
 - 5.6.3.3 India
 - 5.6.3.4 South Korea
 - 5.6.3.5 Australia
 - 5.6.3.6 Rest of Asia
 - 5.6.4 Middle East and Africa

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.6.4.1 GCC
- 5.6.4.2 South Africa
- 5.6.4.3 Rest of Middle East and Africa
- 5.6.5 South America
 - 5.6.5.1 Brazil
 - 5.6.5.2 Argentina
 - 5.6.5.3 Rest of South America

6 Competitive Landscape

6.1 Market Concentration

6.2 Market Share Analysis

6.3 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)

6.3.1 Teladoc Health Inc.

6.3.2 Amwell (American Well Corp.)

6.3.3 Koninklijke Philips N.V.

6.3.4 Cerner Corp. (Oracle Health)

6.3.5 MDLive Inc. (Evernorth)

6.3.6 Aerotel Medical Systems Ltd.

6.3.7 IBM (Watson Health)

6.3.8 Allscripts Healthcare Solutions Inc.

6.3.9 AMD Global Telemedicine Inc.

6.3.10 SOC Telemed

6.3.11 Resideo Technologies Inc.

6.3.12 Medtronic plc

6.3.13 SHL Telemedicine Ltd.

6.3.14 Cisco Systems Inc.

6.3.15 GE Healthcare

6.3.16 Siemens Healthineers

6.3.17 Honeywell International Inc.

6.3.18 Doctor On Demand Inc.

6.3.19 Babylon Holdings Ltd.

6.3.20 Ping An Good Doctor

6.3.21 Practo Technologies Pvt. Ltd.

6.3.22 Zuellig Pharma (Hello Health Group)

7 Market Opportunities & Future Outlook

7.1 White-space & Unmet-Need Assessment

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Telemedicine - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scott's-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scott's-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-04"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com