Connected Care in Europe

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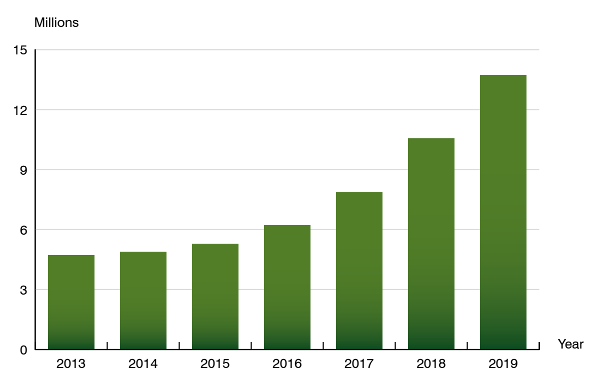
Connected care revenues in Europe will reach € 4.8 billion by 2019

The ageing population and the increasing prevalence of chronic diseases will be two of the greatest challenges in Europe during this century. It is widely believed that connected care solutions can ease the burden on society by enabling more efficient delivery of care and allowing people to live independently in their homes for longer. Berg Insight's definition of connected care comprises telecare and telehealth solutions that are used for the remote delivery of healthcare and social care services. Today, the most common connected care solution is the traditional telecare alarm, which includes a wearable alarm button that the user presses in the case of an emergency. Next-generation telecare systems are technologically more advanced and can automatically trigger an alarm, for instance if the user leaves home at an unexpected time or forgets to take his or her medicine. Furthermore, next-generation telecare solutions include mobile telecare alarms that users can carry with them at all times. Telehealth solutions involve connected medical devices and monitoring services that are used for the remote management of patients with COPD, chronic heart failure, diabetes, hypertension, asthma, coronary heart disease or chronic kidney disease.

Traditional telecare is the largest and most mature segment of the connected care market with a total of 4.55 million users at the end of 2013. In contrast to this, the markets for next-generation telecare and telehealth solutions are still in nascent stages. At the end of 2013, there were 0.69 million users of next-generation telecare solutions in EU28+2, whereas the number of telehealth users reached just 0.06 million. The total number of people using connected care solutions totalled 4.7 million at the end of 2013, as there is some overlap between the three solution categories. The market is forecasted to grow at a CAGR of 19.8 percent during the next six years to reach 13.7 million connected care users by 2019. Berg Insight expects that traditional telecare will remain the largest segment of the connected care market with 5.6 million users in 2019. However, traditional telecare will be closely followed by next-generation telecare and telehealth that are growing more quickly and will reach a forecasted 4.9 million users and 4.7 million users respectively at the end of the forecast period.

Connected care revenues in the EU28+2 countries reached an estimated € 1.7 billion in 2013. This includes revenues from traditional telecare solutions, next-generation telecare solutions and telehealth solutions. The market is expected to grow at a CAGR of 19.0 percent between 2013 and 2019 to reach € 4.8 billion at the end of the forecast period. Traditional telecare solutions accounted for the largest share of the market in 2013, but will not grow as quickly as the next-generation telecare and telehealth markets during the next six years.



Connected care systems in use, millions (Europe 2013–2019)

The traditional telecare equipment market in Europe is highly consolidated. The two major players – Tunstall and Legrand – hold leading positions in nearly all markets and together account for 70 percent of telecare unit sales in the region. The next-generation telecare market is on the other hand fragmented. In addition to the leading telecare equipment vendors, companies active in the next-generation market include specialized providers such as Essence Group, Telecom Design and Vivago in activity monitoring; Doro, Everon and Limmex in mobile telecare; and Evondos, Innospense and Medicpen in medication compliance monitoring. The telehealth market is similarly a fragmented market that is evolving quickly. Many new start-ups as well as well-established solution providers from adjacent industries are entering the market. Examples include Alere, Apple, BT Group, Comarch, Silverbullet, SHL Telemedicine, Telefónica and Voluntis.

The ongoing digitalization of telephone networks in Europe will require massive replacements of PSTN-based telecare systems in the coming years. At the same time, there is rising interest in new types of solutions that enable social care and healthcare services to be delivered more efficiently. Berg Insight expects that these trends will catalyse the transition to the next generation of connected care solutions. One of the results of this shift will be that software becomes more important in a market that has traditionally been hardware-centric – a change that can allow new companies to enter the market and result in substantial changes in the competitive landscape. The transition to digital technologies is good news for mobile network operators, as the vast majority of all new connected care systems rely on cellular connectivity. In fact, Berg Insight predicts that the number of cellular connections will grow from around 0.3 million in 2013 to more than 7.7 million in 2019.

This report answers the following questions:

- Which are the main verticals within connected care?
- What are the main drivers on this market in Europe?
- How many people are using telecare systems in each European country?
- What are the general technology trends for connected care products?
- How will the digitalisation of telephone networks affect the market?
- Which are the leading telecare equipment providers in Europe?
- How will the connected care market evolve in the next five years?
- Will the markets for telehealth, telecare and smart home solutions converge?
- What is the potential market size for wireless M2M communication?

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About the Author

Lars Kurkinen is a Senior Analyst with a Master's Degree in Strategic Management from the Aalto University School of Science and Technology, Finland. He joined Berg Insight in 2010 and his areas of expertise include mHealth, smart homes and mobile financial services.

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