M2M Research Series

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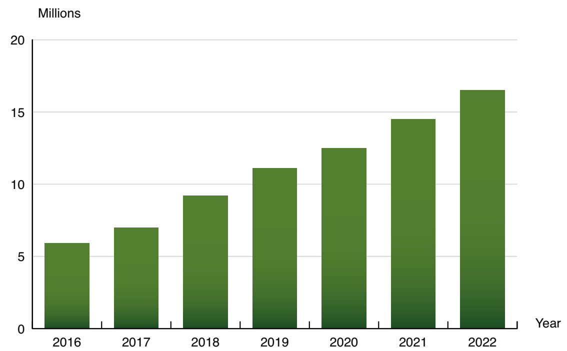
Connected care revenues in Europe will reach € 6.1 billion by 2022

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 5.0 million users at the end of 2016. In contrast to this, the markets for next-generation telecare and telehealth solutions are still in nascent stages. At the end of 2016, there were 1.5 million users of next-generation telecare solutions in EU28+2, whereas the number of telehealth users reached just 0.26 million. The total number of people using connected care solutions totalled 5.9 million at the end of 2016, as there is some overlap between the three solution categories. The market is forecasted to grow at a CAGR of 18.7 percent during the next six years to reach 16.5 million connected care users by 2022. Berg Insight expects that traditional telecare will be overtaken by next-generation telecare as the largest segment of the connected care market with a forecasted 8.1 million users in 2022. However, traditional telecare will follow with 6.2 million users and telehealth with 4.0 million users at the end of the forecast period.

Connected care revenues in the EU28+2 countries reached an estimated € 2.4 billion in 2016. This includes revenues from traditional telecare solutions, next-generation telecare solutions and telehealth solutions. The market is expected to grow at a CAGR of 16.5 percent between 2016 and 2022 to reach € 6.1 billion at the end of the forecast period.



Connected care systems in use, millions (Europe 2016–2022)

Traditional telecare solutions accounted for the largest share of the market in 2016, but will not grow as quickly as the next-generation telecare and telehealth markets during the next six years.

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, Navigil and LOSTnFOUND 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, BodyTel, H2AD, iHealth, S3 Connected Health and Qualcomm Life.

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. Future caregiving is also anticipated to be predictive in nature by analysing user big data and acting on abnormalities. Another trend is that care will be a natural part of smart home concepts. 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 1.2 million in 2016 to more than 8.1 million in 2022. Another significant trend is BYOD, where the user's own device will be used as hub.

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?
- Which are the leading telecare equipment providers in Europe?
- How will the connected care market evolve in the next five years?
- How 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 Authors

Johan Fagerberg is co-founder and an experienced analyst with a Master's degree in Electrical Engineering from Chalmers University of Technology. He has during the past 20 years published numerous articles and reports about M2M/IoT markets.

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Berg Insight offers premier business intelligence to the telecom industry. We produce concise reports providing key facts and strategic insights about pivotal developments in our focus areas. Berg Insight also offers detailed market forecast databases and advisory services. Our vision is to be the most valuable source of intelligence for our customers.

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Connected Care in Europe is the foremost source of information about the telehealth and telecare solution markets in this region. Whether you are an equipment vendor, care provider, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

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