

Telemedicine Market in Japan: Key Research Findings 2017

◆ **Research Outline**

Yano Research Institute has conducted a study on the domestic telemedicine market with the following conditions:

1. Research period: April to July, 2017
2. Research target: Domestic enterprises and system vendors developing telemedicine equipment and tools.
3. Research methodologies: Face-to-face interviews by the expert researchers, telephone/email surveys, and literature search

<What is the Telemedicine Market?>

The telemedicine market in this research comprises the following four markets: 1) Remote imaging diagnostics including teleradiology, 2) Telepathology, 3) Telediagnosis, and 4) Telehealthcare systems. The entire market size is calculated by totaling the above four market sizes, all of which are based on the sales of the market players.

◆ **Key Findings**

■ **Telemedicine Market in FY2015 Attained 12,269 Million Yen, Driven by Remote Imaging Diagnostics**

The entire domestic telemedicine market in FY2015 attained 12,269 million yen, boosted by the remote imaging diagnostics market which had already passed its growth period and have entered the period of maturity, but is regarded to grow further with the future technological innovation.

■ **With Number of Vendors and Medical Organizations under Contract Increasing, More Effects Expected from Telediagnosis with Its Rising Rate in 2018 Revision of Medical Payment System**

The announcement regarding “Diagnosis using telecommunications (i.e., Telediagnosis)” by the Ministry of Health, Labour and Welfare in August 2015 pragmatically lifted the ban on telediagnostic (remote diagnostic) services and triggered the vendors to enter the market which led them to develop and launch telediagnostic instrument using smartphones and dedicated applications by 2016.

If telediagnosis is to be raised the rate in the revision of the 2018 medical payment system, the market is likely to expand rapidly, because of a chance of its introduction at growing number of medical organizations.

■ **Telemedicine Market Projected to Achieve 19,906 Million Yen by FY2019**

Together with rapid development of ICT, telemedicine has potential to solve some problems in the current medical environment in general, including lack of doctors, number of doctors being unevenly distributed, increasing population of elderly and etc. Although telemedicine has some challenges to overcome regarding its medical payment, the market size is projected to expand to 19,906 million yen by FY2019, due to its rate expected to be raised in the medical payment system in 2018.

◆ **Report Format:**

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Price: 120,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

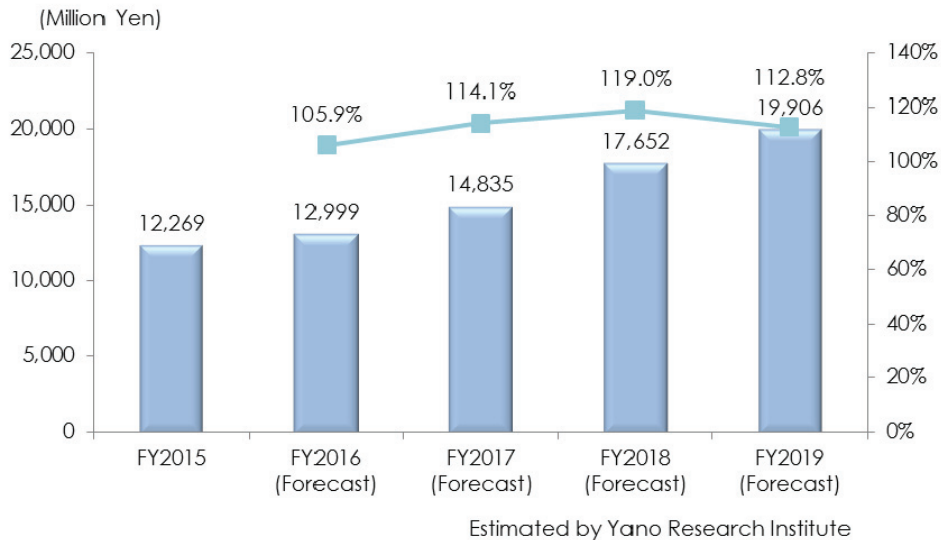
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■ **Figure 1: Forecast of Domestic Telemedicine Market Size**



Notes:

1. The market size is based on the sales of businesses.
2. The telemedicine market in this research comprises the following four markets: 1) Remote imaging diagnostics including teleradiology, 2) Telepathology, 3) Telediagnosis, and 4) Telehealthcare systems. The market size is calculated by totaling the above four market sizes.