

Patient Portal Market - Global Outlook & Forecast 2022-2027

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Report description:

The global patient portal market is expected to grow at a CAGR of 13.62% during 2022-2027.

MARKET OVERVIEW

The significant factors contributing to the demand for the patient portal market are the growing need for patient engagement solutions, the increasing adoption of EHRs, and a growing amount of healthcare data. The surge in the integration of mobile-based health platforms rise in demand for telehealth solutions have also helped the market to grow.

Patient portals are online applications that allow patients to communicate with their healthcare providers. Patient portal applications give patients direct and secure 24-hour access to their electronic health records. Patients can view information like medication history, laboratory results, and discharge summaries through patient portals. Patients can also conduct several other activities, such as requesting prescription refills and scheduling appointments. Patient portal use can increase patient engagement and improve the quality of care provided to individual patients.

Every year, more physicians realize the benefits of adopting a patient portal. The results of surveys by Software Advice revealed a rising number of Americans logging onto patient portals. In May 2019, a survey involving 232 patients found that 72% had access to a patient portal. That is an approximately 64% increase over the finding concluded in a similar study conducted in 2016. Due to its several advantages, the demand for the patient portal market is increasing rapidly.

KEY HIGHLIGHTS

- With the advent of the COVID-19 pandemic, telehealth services such as teleconsultation, telemedicine, and telemonitoring witnessed a high demand in the APAC region. Thereby increasing the adoption of patient portals among healthcare providers and patients.
- EHR/EMR adoption rates are higher than ever at around 89%. This increasing rate of EHR adoption is attributable to multiple

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advantages, which include better access to healthcare data, simplified workflow, and more. Also, EHR (Electronic Health Record) systems are highly efficient, cost-effective, and accessible anytime and anywhere.

-□With the burden of the aging population and chronic diseases increasing globally, a digital health strategy has become more vital than ever for healthcare providers and payers. Implementing next-generation healthcare technologies like cloud-based services is taking precedence as healthcare providers seek to manage the influx of patients, health information, and expectations for a more consumer-friendly healthcare experience with the help of patient portals.

-□With the advent of computer systems and their potential, digitization of all clinical exams and medical records in healthcare systems has become a standard and widely adopted practice. In 2003, a division of the National Academies of Sciences, Engineering, and Medicine, known as the Institute of Medicine, selected the term electronic health records (EHRs) to represent records maintained for improving the health care sector for the benefit of patients and clinicians.

-□Greenway Health LLC is a prominent patient portal market company that provides HER, practice management, and revenue cycle solutions. Its patient portal combines integrated Greenway patient messaging for patient-provider engagement. It simplifies for meaningful use and value-based reimbursement through simple, fast registration, secure messaging, and a quick view of health records.

MARKETS TRENDS

Integration of AI & Improvisation of Virtual Healthcare in Patient Portals

a)□Practical uses for artificial intelligence (AI) have long been theoretical, but these applications and technologies have been evolving rapidly. AI is widely adopted in various key areas related to clinical care. One of these includes using chatbots/bots and patient portals. Bots have the capabilities to learn from interactions and understand natural language patterns, which will continue to increase the demand for patient portals. These can significantly impact several functions that serve the patient experience and streamline mundane processes for the healthcare providers. AI and machine learning tools are promising in sorting patient portal messages that cause high-risk inquiries. With the growing digitization of healthcare, the need for AI and related technologies will become more important.

b)□Patient portals are solving the problem associated with virtual healthcare systems by reducing care continuity, providing easy medical referrals, providing medical history rapidly, lower examination costs, and saving doctors time. Patients utilizing virtual primary healthcare neither have a primary care physician nor access to the traditional scheduled prior care model of healthcare. Virtual healthcare also minimizes costs for patients, with less to no travel costs, and virtual care expenses are generally less than in-person care. In addition, the continuous access of patients to a secure patient portal depicts that the patient can share stored medical information with a remote medical provider. Virtual care also minimizes costs for healthcare systems and hospitals.

Rising Healthcare Digitalization & Government Policies Implementing Healthcare IT

a)□The increasing usage of information technology (IT) in the healthcare sector is raising the demand for integrated systems, as various government initiatives such as Accountable care organization (ACO) programs. The introduction of Stage 2 Meaningful Use criteria that stand the healthcare providers for providing online access to the patient regarding their medical information is boosting the adoption of patient portals.

b)□Recently Office of the National Coordinator for Health Information Technology (ONC) has reported that only 8% of hospitals with electronic health records (EHR) have more than 50% activation of the online portals by patients. The federal government is helping in the pay for implementation of electronic health records through what is now called the Promoting Interoperability Program, which requires 50% or more of discharged patients in the hospital have access to viewing, downloading, and transmitting their health information.

c)□The effectiveness of IT in resolving medication problems has become widely prevalent. IT has shown powerful capabilities for managing more significant amounts of data and implementing decision support mechanisms like monitoring drug-drug interactions and checking medication details. It also can access patient health records. With the rising role of IT, patients are

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increasingly becoming engaged in healthcare, and this development is supported by the growth of IT in society.

Integration of Electronic Health Records with Patient Portals

a) The adoption of EHRs is attributable to multiple advantages, which include better access to healthcare data, simplified workflow, improved clinical research quality, prevention of side effects, high patient safety, enhanced patient engagement, and compliance with regulatory standards. Some healthcare IT vendors offer EHRs with a native portal built into the software. It is estimated that 5% engagement through EHR is needed to meet the patient portal's requirements for a healthcare organization to form or strengthen its relationship with patients. Over the last two decades, the early advancement of the standalone personal EHRs, and later tethered patient portals showed a transformative effect on patient engagement by providing them with tools for managing health and unprecedented access to health data.

Growing Patient Engagement & Optimization of Expenses for Healthcare Providers

a) With the rise in adoption and use of patient portals, healthcare practices are likely to see higher patient engagement and fulfillment and a better-streamlined workflow that conserves time and effort for staff and physicians. Portals are giving patients more chances to connect with their doctors and transforming the patient-physician relationship closer than before. This bi-directional messaging between patients and doctors can increase patient satisfaction and engagement. The adoption of patient portals can reduce the overhead costs for healthcare providers. According to a survey, around 60% of respondents reported an integrated digital patient intake management solution that increased efficiency, focused more on the patient experience, and reduced overhead with more straightforward processing and patient check-in management.

MARKET RESTRAINTS

Security & Privacy Risks coupled with Lack of Proper Interface and Health Literacy.

a) With the growing usage of patient portal systems, there has been a concern about security regarding data handling. It is necessary to ensure that only healthcare professionals involved in the patient portal can access the system and the prescriptions within it. Security issues regarding patient confidentiality, authorization issues, identity authentication, scalability, availability, and reliability are of the highest concern. Electronic information security and system will be crucial in driving the patient portal market.

b) Patient health literacy is an essential component of patient engagement as it allows patients to read, understand, and use the various terminology related to their health. Patients with limited health literacy may struggle to understand the content of their medical notes, which can include visit summaries with medical terms, lab reports, and terms and phrases that are not shared outside of medicine. This can also be a challenge for the growth in the adoption of patient portals.

MARKET SEGMENTATION

- In 2021, integrated type accounted for the highest share of 57.74% in the global patient portals market. Majorly because patient portals integrated with EHRs/EMRs provide complete health information and added benefits compared to standard patient portals.

- In 2021, the web & cloud-based segment accounted for the highest global patient portal market share. Primary, because the web & cloud-based are more advanced and can be accessed through multiple locations, whereas on-premises lack many features to stay current with security, performance, and reliability.

- The patient portal market by end-user includes hospitals, clinics & physician offices, payers, and others. In 2021, hospitals accounted for the highest share of 41.45% in the global patient portals market because hospitals have a large number of incoming patients and need to store a vast amount of health data compared to any other healthcare facility.

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Segmentation by Product Type

- Integrated
- Standalone

Segmentation by Delivery Mode

- Web & Cloud-based
- On-premises

Segmentation by End-Users

- Hospitals
- Clinics & Physician Offices
- Payers
- Others

GEOGRAPHICAL ANALYSIS

The global patient portal market includes North America, Europe, APAC, Latin America, and Middle East & Africa. In 2021, North America accounted for the highest share of 35.11% in the global patient portals market.

Patient portals are witnessing massive demand with several revolutionary technologies in the healthcare IT sector happening over the decades. Across the five regions, North America is dominating the global patient portal market due to the demand for easy access and improved portal efficiency. Moreover, government initiatives in the region have further fueled the growth of the patient portal market. In addition, higher adoption of EHRs across the countries in the region, such as the United States and Canada. Further, this has raised the ease of access to the patients healthcare data through portals.

After North America, Europe accounted for the second highest global patient portal market share. APAC is likely the fastest growing region in the global patient portal market compared to other regions. Major technological advancements in healthcare services through mobile-based technologies, web-based patient diaries, wearable technologies, and other digital approaches are expected to increase the overall size of the patient portal market in this region. Latin America and Middle East & Africa are expected to witness slow growth due to the lack of awareness regarding healthcare IT services.

Segmentation by Geography

- North America
 - o□US
 - o□Canada
- Europe
 - o□Germany
 - o□France
 - o□UK
 - o□Italy
 - o□Spain
- APAC
 - o□Japan
 - o□China
 - o□India
 - o□South Korea
 - o□Australia
- Latin America

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- o Brazil
- o Mexico
- o Argentina
- Middle East & Africa
- o Turkey
- o Saudi Arabia
- o South Africa
- o UAE

COMPETITIVE LANDSCAPE

The global patient portal market is moderately consolidated, with a bunch of major players accounting for a higher share in the market and promoting its growth. International players such as Allscripts Healthcare Solutions, athenahealth, Cerner, eClinicalworks, Epic Systems, GE Healthcare, Solutionreach, and UPDOX have contributed significant market shares. With emerging players and the growing number of start-ups, the market will likely experience a high growth rate and intense competition among the players.

RECENT DEVELOPMENTS & KEY NEWS:

- In March 2021, TrueCare, launched its MyChart patient portal to help patients quickly access and manage their health information.
- In June 2021, Epic Corporation collaborated with the Orlando Health St. Cloud Hospital for EHR integration with Epic's MyChart patient portal. This collaboration will promote streamlining health data and care delivery across the healthcare system, offering a competitive advantage to the company.
- In January 2020, Bridge Patient Portal reported the launch of its new telehealth solution that leverages Zoom for Healthcare.
- In August 2019, IQVIA (US) launched IQVIA Patient Portal, a web-based solution built on a health cloud platform to increase patient engagement and recruitment.

STRATEGIC RECOMMENDATIONS

- During the forecast period, emerging players are expected to grow in the market as many countries have vigorously promoted the broader adoption of patient portals.
- Many vendors are offering patient portal solutions with advanced features, such as patient management, medical billing, and others, to meet the requirements of various end users.
- Most vendors have begun incorporating patient portals with EHR software to provide cost-effective and advanced solutions.
- The advances in healthcare technologies will enable the development of comprehensive patient portals, enhancing the physicians' capabilities and patients' quality of life.

Key Vendors

- Epic Systems
- Cerner
- eClinicalWorks
- Athenahealth
- Allscripts Healthcare Solutions
- General Electric
- Solutionreach
- Updax

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Other Prominent Vendors

- Adelante Healthcare
- Advanced Data Systems
- AdvancedMD
- AIMDek Technologies
- Bizmatics
- Bridge Patient Portal
- CapMinds
- Change Healthcare
- ClinicTracker
- CureMD Healthcare
- Elation
- EPIC Health
- Greenway Health
- Health Myself Innovations
- Hello Health
- InSync Healthcare Solutions
- INTELICHART
- iSalus Healthcare
- Itransition
- La Jolla Digital
- Manage My Health
- MEDHOST
- Medical Healthcare Solutions
- Medical Information Technology
- MedicalMine
- Meditab
- Medsphere Systems
- Napier Healthcare Solutions
- NXGN Management
- Practice HER
- Siemens Healthcare
- ViSolve

KEY QUESTIONS ANSWERED

- 1.□What is the size of the global patient portal market?
- 2.□What is the global patient portal market growth?
- 3.□How will the patient portal market grow in the U.S.?
- 4.□Who are the key players in the patient portal market?
- 5.□Which region will dominate the global patient portal market landscape?

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