

Patient Engagement Solutions Market by Component (Hardware (Tablet)), Software (Integrated), Therapy (CVD, Diabetes), Functionality (Education, Scheduling), User (Provider, Payer (Public)), Unmet Need, Investment, Buying Criteria - Global Forecast to 2028

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Report description:

The patient engagement solutions market is projected to reach USD 41.8 billion by 2028 from USD 22.5 billion in 2023, at a CAGR of 13.2% during the forecast period. Factors such as the growing demand for patient engagement solutions and the increasing utilization of m-health apps are driving the market growth.

However, high investment requirements for healthcare infrastructure and the scarcity of skilled IT professionals in the healthcare industry are expected to restrain the growth of this market during the forecast period.

"Services segment is expected to grow at the highest rate from 2023 to 2028."

By components, the patient engagement solutions market is divided into software, hardware, and services. The software segment holds the largest share of the global patient engagement solutions market in 2022. The hardware is further segmented into in-room televisions, integrated bedside terminals/assisted devices and tablets. The software market is further divided into standalone software and integrated software. In 2022, the integrated solutions segment holds the larger share of this market & is also projected to grow at the highest CAGR during the forecast period.

Nevertheless, the services segment is projected to exhibit the highest CAGR from 2023 to 2028. The notable growth in the services segment can be attributed to factors such as the increasing investments in the development of innovative service models that offer value-based, patient-centered care, driving the market growth for services.

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"The on-premise solutions segment is anticipated to dominate the Patient Engagement Solutions market in 2023."

When considering delivery modes, the patient engagement solutions market is categorized into on-premise and cloud-based/web-based modes. In 2023, it is projected that the on-premise solutions segment will command the largest share of the global patient engagement solutions market. However, the cloud-based/web-based mode segment is forecasted to exhibit the highest CAGR from 2023 to 2028. The substantial share of this segment can be attributed to the growth support provided by the flexibility, scalability, and affordability features inherent in cloud-based solutions within the patient engagement solutions market.

"In 2022, the Health management segment accounted for the largest share of the global patient engagement solutions market, by applications."

By application, the patient engagement solutions market is divided into health management, home health management, social and behavioral management, and financial health management. In 2023, the health management applications segment accounts for the largest share of the global patient engagement solutions market. Health management includes a wide range of patient engagement tools that help patients engage with their providers and take initiatives to improve or maintain their health status and increased awareness among patients about health conditions are the factors driving market growth.

"In 2022, Chronic diseases accounted for the largest share of the global patient engagement solutions market by therapeutic area."

By therapeutic area, the patient engagement solutions market is divided into chronic diseases (cardiovascular disease, diabetes, obesity and other chronic diseases), women's health, fitness, and other therapeutic areas. The chronic diseases segment dominated this market in 2022. In 2022, the cardiovascular diseases segment accounted for the largest share of the patient engagement solutions market for chronic diseases. However, the diabetes segment is projected to register the highest CAGR during the forecast period, owing to the high prevalence and incidence of diabetes worldwide.

"Patient/client scheduling accounted for the largest share of the global patient engagement solutions market, by functionality."

By functionality, the patient engagement solutions market is divided into E-prescribing, document management, telehealth, patient/client scheduling, patient education, billing & payments and other functionalities. The patient/client scheduling segment accounted for the largest share of the patient engagement solutions market, by functionality, in 2022. The large share of the patient/client scheduling segment is mainly attributed to increasing government initiatives to boost patient engagement software adoption to provide quality care by physicians to their patients at lower costs.

"Providers' segment accounted for the largest share of the global patient engagement solutions market by end user in 2022."

By end users, the patient engagement solutions market is divided into providers, payers, patients, and other end users. The providers are further bifurcated into hospitals and healthcare systems, ambulatory care centers, home healthcare, and other providers. Moreover, the payers are further divided into private and public. By end users, the providers segment accounted for the largest share of the global patient engagement solutions market in 2022. The large share of this segment is due to the increasing implementation of patient engagement solutions to curtail mounting healthcare costs, offer value-based care, and expand financial outcomes are factors that are driving the growth of this segment.

"North America to dominate the patient engagement solutions market in 2022."

In 2022, North America dominated the global patient engagement solutions market by region. Factors such as favorable government initiatives and regulations, the imperative to reduce healthcare costs, the increasing prevalence of chronic diseases, and the presence of key market players contribute significantly to the growth of the patient engagement solutions market in North

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America.

The Asia Pacific market is expected to achieve the highest CAGR during the forecast period from 2023 to 2028. This growth is attributed to the escalating adoption of Healthcare Information Technology (HCIT) solutions and the increasing prevalence of chronic diseases in the region. The rising patient volume and the growing need for accurate and timely diagnosis and treatment further contribute to the anticipated growth of the patient engagement solutions market in the Asia Pacific region.

Breakdown of supply-side primary interviews by company type, designation, and region:

- By Company Type: Tier 1 (45%), Tier 2 (30%), and Tier 3 (25%)
- By Designation: C-level (44%), Director-level (35%), and Others (21%)
- By Region: North America (46%), Europe (26%), Asia Pacific (18%), Latin America (7%), and Middle East & Africa (10%)

McKesson Corporation (US), Veradigm (US), Oracle Corporation (US), Merative (US), Epic Systems Corporation (US), Orion Health (New Zealand), GetWellNetwork (US), athenahealth (US), Oneview Healthcare (Ireland), MEDITECH (US), IQVIA (US), Get Real Health (US), Cognizant (US), Harris Healthcare (US), Kareo (US), CureMD Healthcare (US), eClinicalWorks (US), and Lincor Solutions (US), AdvancedMD (US), Luma Health Inc. (US), WellStack(US), Vivify Health (US), Medhost (US), MEDISYSINC (US), and Patient point LLC (US). These players are increasingly focusing on new product launches and partnerships to expand their product offerings in the patient engagement solutions market.

Research Coverage

- The report studies the Patient Engagement Solutions market based on component, delivery mode, therapeutic area, application, functionality, end user, and region.
- The report analyzes factors (such as drivers, restraints, opportunities, and challenges) affecting the market growth.
- The report evaluates the opportunities and challenges in the market for stakeholders and provides details of the competitive landscape for market leaders.
- The report studies micro-markets with respect to their growth trends, prospects, and contributions to the total patient engagement solutions market.
- The report forecasts the revenue of market segments with respect to five major regions.

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Reasons to Buy the Report

- This report will enrich established firms as well as new entrants/smaller firms to gauge the pulse of the market, which, in turn, would help them garner a greater share of the market. Firms purchasing the report could use one or a combination of the below-mentioned strategies to strengthen their positions in the market.
- This report provides insights on:
 - Analysis of key drivers (implementation of government regulations and initiatives to promote patient centric care, increasing adoption of patient engagement solutions, rising number of collaborations and partnerships between stakeholders, increasing utilization of mobile health apps), restraints (large investment requirement for healthcare infrastructure, protection of patient information, inadequate interoperability across healthcare providers and shortage of skilled IT professionals in the healthcare industry), opportunities (growth opportunities in emerging markets, wearable health technology, cloud computing solutions), and challenges (high deployment cost of healthcare IT systems, low levels of healthcare literacy) impacting the growth of the Telehealth and Telemedicine market.
 - Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the patient engagement solutions market.
 - Market Development: Comprehensive information on the lucrative emerging markets, components, delivery mode, therapeutic area, application, functionality, end user, and region
 - Market Diversification: Exhaustive information about the product portfolios, growing geographies, recent developments, and investments in the patient engagement solutions market
 - Competitive Assessment: In-depth assessment of market shares, growth strategies, product offerings, company evaluation

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quadrant, and capabilities of leading players in the global Patient Engagement Market.

Table of Contents:

1	INTRODUCTION	64
1.1	STUDY OBJECTIVES	64
1.2	MARKET DEFINITION	64
1.2.1	PATIENT ENGAGEMENT SOLUTIONS MARKET: INCLUSIONS & EXCLUSIONS	65
1.3	MARKET SCOPE	66
1.3.1	MARKETS COVERED	66
1.3.2	REGIONAL SEGMENTATION	67
1.3.3	YEARS CONSIDERED	67
1.4	CURRENCY CONSIDERED	68
1.5	STAKEHOLDERS	68
1.6	SUMMARY OF CHANGES	68
1.7	RECESSION IMPACT	69
2	RESEARCH METHODOLOGY	70
2.1	RESEARCH DATA	70
FIGURE 1	RESEARCH DESIGN	70
2.1.1	SECONDARY DATA	71
2.1.1.1	Key data from secondary sources	72
2.1.2	PRIMARY RESEARCH	73
2.1.3	PRIMARY SOURCES	73
2.1.4	KEY DATA FROM PRIMARY SOURCES	74
2.1.5	KEY INDUSTRY INSIGHTS	75
FIGURE 2	BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION	75
2.2	MARKET SIZE ESTIMATION METHODOLOGY	75
FIGURE 3	RESEARCH METHODOLOGY: HYPOTHESIS BUILDING	76
2.3	MARKET ESTIMATION	76
2.3.1	RESEARCH METHODOLOGY: MARKET ESTIMATION	77
2.3.2	APPROACH: END USER-BASED MARKET ESTIMATION	77
FIGURE 4	RESEARCH METHODOLOGY: MARKET ESTIMATION	78
2.3.3	TOP-DOWN APPROACH: CONTRIBUTION-BASED MARKET SIZE ESTIMATION	78
2.3.4	TOP-DOWN APPROACH	78
2.3.5	BOTTOM-UP APPROACH	79
FIGURE 5	CAGR PROJECTIONS FROM ANALYSIS OF DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES IN PATIENT ENGAGEMENT SOLUTIONS MARKET (2023-2028)	80
FIGURE 6	CAGR PROJECTIONS: SUPPLY-SIDE ANALYSIS	81
2.4	MARKET DATA ESTIMATION AND TRIANGULATION	82
FIGURE 7	DATA TRIANGULATION METHODOLOGY	82
2.5	ASSUMPTIONS	83
2.6	LIMITATIONS	84
2.6.1	SCOPE-RELATED LIMITATIONS	84
2.6.2	METHODOLOGY-RELATED LIMITATIONS	84
2.7	RISK ASSESSMENT	84
TABLE 1	RISK ASSESSMENT: PATIENT ENGAGEMENT SOLUTIONS MARKET	84
2.8	PATIENT ENGAGEMENT SOLUTIONS MARKET: RECESSION IMPACT	84
3	EXECUTIVE SUMMARY	85

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FIGURE 8	SOFTWARE TO BE LARGEST SEGMENT DURING FORECAST PERIOD	85
FIGURE 9	CLOUD-BASED/WEB-BASED MODE TO REGISTER HIGHEST GROWTH RATE DURING FORECAST PERIOD	86
FIGURE 10	HEALTH MANAGEMENT TO DOMINATE PATIENT ENGAGEMENT SOLUTIONS MARKET DURING FORECAST PERIOD	87
FIGURE 11	PROVIDER TO BE FASTEST-GROWING SEGMENT DURING FORECAST PERIOD	87
FIGURE 12	GEOGRAPHICAL SNAPSHOT OF PATIENT ENGAGEMENT SOLUTIONS MARKET	88
4	PREMIUM INSIGHTS	89
4.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN PATIENT ENGAGEMENT SOLUTIONS MARKET	89
FIGURE 13	GOVERNMENT INITIATIVES FOR PATIENT-CENTRIC CARE TO DRIVE MARKET	89
4.2	NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET, BY DELIVERY MODE & COUNTRY (2022)	90
FIGURE 14	ON-PREMISE MODE ACCOUNTED FOR LARGEST SHARE OF NORTH AMERICAN MARKET IN 2022	90
4.3	PATIENT ENGAGEMENT SOLUTIONS MARKET: GEOGRAPHIC GROWTH OPPORTUNITIES	91
FIGURE 15	ASIA PACIFIC TO REGISTER HIGHEST GROWTH RATE DURING FORECAST PERIOD	91
4.4	PATIENT ENGAGEMENT SOLUTIONS MARKET: REGIONAL MIX	91
FIGURE 16	ASIA PACIFIC MARKET TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD	91
4.5	PATIENT ENGAGEMENT SOLUTIONS MARKET: DEVELOPED VS. EMERGING ECONOMIES	92
FIGURE 17	EMERGING ECONOMIES TO REGISTER HIGHER GROWTH RATE DURING FORECAST PERIOD	92
5	MARKET OVERVIEW	93
5.1	INTRODUCTION	93
5.2	MARKET DYNAMICS	93
FIGURE 18	DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES IN PATIENT ENGAGEMENT SOLUTIONS MARKET	93
5.2.1	DRIVERS	94
5.2.1.1	Implementation of government regulations and initiatives to promote patient-centric care	94
5.2.1.2	Increasing adoption of patient engagement solutions	95
5.2.1.3	Rising number of collaborations and partnerships between stakeholders	96
TABLE 2	INDICATIVE LIST OF COLLABORATIONS BETWEEN ORGANIZATIONS FROM 2020 TO 2023	96
5.2.1.4	Increasing utilization of mobile health apps	97
5.2.1.5	Rising geriatric population and subsequent increase in prevalence of chronic diseases	97
FIGURE 19	GERIATRIC POPULATION, BY REGION, 2010-2030 (% OF TOTAL POPULATION)	98
5.2.2	RESTRAINTS	98
5.2.2.1	Large investment requirements for healthcare infrastructure	98
5.2.2.2	Protection of patient information	99
FIGURE 20	HEALTHCARE BREACHES REPORTED TO US DEPARTMENT OF HEALTH AND HUMAN SERVICES IN 2021	99
5.2.2.3	Inadequate interoperability across healthcare providers	99
5.2.2.4	Shortage of skilled IT professionals in healthcare industry	100
5.2.3	OPPORTUNITIES	100
5.2.3.1	Growth opportunities in emerging markets	100
5.2.3.2	Wearable health technology	101
5.2.3.3	Cloud-computing solutions	102
5.2.4	CHALLENGES	102
5.2.4.1	High deployment costs of healthcare IT systems	102
5.2.4.2	Low levels of healthcare literacy	103
5.3	TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES	103
FIGURE 21	REVENUE SHIFTS AND NEW REVENUE POCKETS FOR PATIENT ENGAGEMENT SOLUTIONS MARKET	103
5.4	INDUSTRY TRENDS	104
5.4.1	AI-DRIVEN DIGITAL TRANSFORMATION TO DRIVE NEXT WAVE OF PATIENT ENGAGEMENT	104
5.4.2	REAL-TIME REMOTE DIAGNOSIS TO BE INTEGRAL PART OF PATIENT ENGAGEMENT	104
5.4.3	ROLE OF MHEALTH IN PATIENT ENGAGEMENT	104

5.4.4	GROWING ADOPTION OF TELEMEDICINE	105
5.4.5	RISE OF SMART HOSPITAL ROOMS AND BEDSIDE TABLETS	105
5.4.6	GROWING DEMAND FOR VALUE-BASED HEALTHCARE	105
5.5	ECOSYSTEM ANALYSIS	106
FIGURE 22 PATIENT ENGAGEMENT SOLUTIONS MARKET: ECOSYSTEM ANALYSIS		106
5.6	VALUE CHAIN ANALYSIS	107
5.6.1	RESEARCH AND DEVELOPMENT	107
5.6.2	MATERIAL COMPONENTS	107
5.6.3	MANUFACTURERS AND DEVELOPERS	107
5.6.4	DISTRIBUTION AND SALES	107
5.6.5	END-USER INDUSTRIES	107
5.6.6	POST-SALE SERVICES	107
FIGURE 23 PATIENT ENGAGEMENT SOLUTIONS MARKET: VALUE CHAIN ANALYSIS		108
5.7	TECHNOLOGY ANALYSIS	108
5.7.1	ARTIFICIAL INTELLIGENCE (AI) AND MACHINE LEARNING (ML)	108
5.7.2	VIRTUAL REALITY (VR) AND AUGMENTED REALITY (AR)	108
5.7.3	REMOTE MONITORING DEVICES AND WEARABLES	108
5.8	TARIFF AND REGULATORY ANALYSIS	109
5.8.1	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	109
TABLE 3 NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS		109
TABLE 4 EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS		111
TABLE 5 ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS		112
TABLE 6 REST OF THE WORLD: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS		113
5.8.2	NORTH AMERICA	114
5.8.2.1	US	114
5.8.2.1.1	Health Insurance Portability and Accountability Act of 1996 (HIPAA)	114
5.8.2.1.2	Health Information Technology for Economic and Clinical Health Act of 2009 (HITECH)	114
5.8.2.1.3	Consumer Privacy Protection Act of 2017	114
5.8.2.1.4	Affordable Care Act, 2010	114
5.8.2.2	Canada	114
5.8.2.2.1	Personal Information Protection and Electronic Documents Act (PIPEDA)	114
5.8.3	EUROPE	115
5.8.3.1	General Data Protection Regulation (GDPR), European Union (EU)	115
5.8.3.2	EU Cybersecurity Act	115
5.8.3.3	Germany	115
5.8.3.3.1	German Data Protection Act (Bundesdatenschutzgesetz, BDSG)	115
5.8.3.4	France	115
5.8.3.4.1	French Data Protection Act	115
5.8.3.5	Italy	116
5.8.3.5.1	Personal Data Protection Code (Legislative Decree 196/2003)	116
5.8.4	ASIA PACIFIC	116
5.8.4.1	China	116
5.8.4.1.1	Cybersecurity Law of People's Republic of China	116
5.8.4.2	Japan	116
5.8.4.2.1	Act on Protection of Personal Information (APPI)	116
5.8.4.3	India	116
5.8.4.3.1	The Information Technology Act, 2000	116

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5.8.5	LATIN AMERICA	116
5.8.5.1	Protection of Personal Information Act	116
5.8.6	MIDDLE EAST & AFRICA	117
5.8.6.1	Private Cloud Computing Regulatory Framework	117
5.9	PRICING ANALYSIS	117
5.9.1	PRICING OVERVIEW	117
FIGURE 24	PATIENT ENGAGEMENT SOLUTIONS MARKET: PRICING COMPONENTS	117
5.9.2	AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY APPLICATION	118
FIGURE 25	AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY APPLICATION	118
TABLE 7	AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY APPLICATION	119
5.9.3	INDICATIVE PRICING ANALYSIS OF PATIENT ENGAGEMENT SOLUTIONS	119
TABLE 8	INDICATIVE PRICING ANALYSIS OF PATIENT ENGAGEMENT SOLUTIONS	119
5.10	TRADE ANALYSIS	120
FIGURE 26	EXPORT DATA FOR HS CODE 854231 FOR TOP COUNTRIES IN PATIENT ENGAGEMENT SOLUTIONS MARKET, 2022 (USD THOUSAND)	120
FIGURE 27	IMPORT DATA FOR HS CODE 854231 FOR TOP COUNTRIES IN PATIENT ENGAGEMENT SOLUTIONS MARKET, 2022 (USD THOUSAND)	121
5.11	PORTER'S FIVE FORCES ANALYSIS	121
TABLE 9	PATIENT ENGAGEMENT SOLUTIONS MARKET: PORTER'S FIVE FORCES ANALYSIS	121
5.11.1	INTENSITY OF COMPETITIVE RIVALRY	122
5.11.2	BARGAINING POWER OF SUPPLIERS	122
5.11.3	BARGAINING POWER OF BUYERS	122
5.11.4	THREAT OF NEW ENTRANTS	122
5.11.5	THREAT OF SUBSTITUTES	122
5.12	PATENT ANALYSIS	123
5.12.1	PATENT PUBLICATION TRENDS FOR PATIENT ENGAGEMENT SOLUTIONS	123
FIGURE 28	PATENT PUBLICATION TRENDS (JANUARY 2012-NOVEMBER 2023)	123
5.12.2	INSIGHTS: JURISDICTION AND TOP APPLICANT ANALYSIS	123
FIGURE 29	TOP APPLICANTS AND OWNERS (COMPANIES/INSTITUTES) FOR PATIENT ENGAGEMENT SOLUTIONS (JANUARY 2012-NOVEMBER 2023)	124
FIGURE 30	TOP APPLICANT COUNTRIES/REGIONS FOR PATIENT ENGAGEMENT SOLUTIONS PATENTS DOCUMENTS	124
TABLE 10	PATIENT ENGAGEMENT SOLUTIONS MARKET: LIST OF MAJOR PATENTS	125
5.13	KEY STAKEHOLDERS AND BUYING CRITERIA	127
5.13.1	KEY STAKEHOLDERS IN BUYING PROCESS	127
TABLE 11	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR PATIENT ENGAGEMENT SOLUTIONS	127
FIGURE 31	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR PATIENT ENGAGEMENT SOLUTIONS	128
TABLE 12	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS (%) FOR PATIENT ENGAGEMENT SOLUTIONS	128
5.13.2	BUYING CRITERIA	129
FIGURE 32	KEY BUYING CRITERIA FOR PATIENT ENGAGEMENT SOLUTIONS	129
TABLE 13	KEY BUYING CRITERIA FOR PATIENT ENGAGEMENT SOLUTION COMPONENTS	129
5.14	END USER ANALYSIS	130
5.14.1	UNMET NEEDS	130
TABLE 14	UNMET NEEDS IN PATIENT ENGAGEMENT SOLUTIONS MARKET	130
5.14.2	END USER EXPECTATIONS	131
TABLE 15	END USER EXPECTATIONS IN PATIENT ENGAGEMENT SOLUTIONS MARKET	131
5.15	KEY CONFERENCES & EVENTS IN 2023-2024	132
TABLE 16	PATIENT ENGAGEMENT SOLUTIONS: DETAILED LIST OF CONFERENCES & EVENTS	132

5.16	REPLACEMENT TRENDS FOR PATIENT ENGAGEMENT SOLUTIONS	133
5.17	PATIENT ENGAGEMENT SOLUTIONS INVESTMENT LANDSCAPE	134
FIGURE 33	INVESTOR DEALS AND FUNDING IN PATIENT ENGAGEMENT SOLUTIONS SOARED IN 2022	134
FIGURE 34	MOST VALUED PATIENT ENGAGEMENT SOLUTION FIRMS IN 2022 (USD BILLION)	134
5.18	PATIENT ENGAGEMENT SOLUTIONS BUSINESS MODELS	135
5.18.1	SUBSCRIPTION-BASED MODEL	135
5.18.2	LICENSING MODEL	135
5.18.3	HYBRID MODEL	135
5.18.4	FREEMIUM MODEL	135
5.18.5	VALUE-BASED PRICING MODEL	135
5.18.6	DATA MONETIZATION	135
5.18.7	CUSTOM DEVELOPMENT/CONSULTING MODEL	135
5.18.8	INTEGRATION WITH EXISTING SYSTEMS	135
5.18.9	PARTNERSHIPS WITH HEALTHCARE PROVIDERS	136
5.18.10	WHITE-LABEL SOLUTIONS	136
5.18.11	OPEN-SOURCE SOFTWARE	136
5.19	USE CASES/CASE STUDIES	136
5.19.1	FOCUS ON REDUCING READMISSION RATES AND IMPROVING CARE	136
5.19.1.1	Use case 1: Need to reduce patient hospital stays	136
5.19.2	IMPROVE OUTPATIENT COMMUNICATION	136
5.19.2.1	Case 2: Rising need to curb miscommunication with discharged patients	136
5.19.3	PATIENT ENGAGEMENT STRATEGY	137
5.19.3.1	Use case 3: Post-discharge care	137
5.19.4	AN EMR-AGNOSTIC PATIENT ENGAGEMENT PLATFORM WITH COMPREHENSIVE BUILT-IN CAPABILITIES	137
5.19.4.1	Use case 4: To improve patient engagement, giving patients ability to access all their medical information in one place	137
6	PATIENT ENGAGEMENT SOLUTIONS MARKET, BY COMPONENT	138
6.1	INTRODUCTION	139
TABLE 17	PATIENT ENGAGEMENT SOLUTIONS MARKET, BY COMPONENT, 2021-2028 (USD MILLION)	139
6.2	HARDWARE	139
6.2.1	INTERACTIVE EXPERIENCE FOR PATIENTS & FAMILIES	139
TABLE 18	HARDWARE MARKET, BY TYPE, 2021-2028 (USD MILLION)	140
TABLE 19	HARDWARE MARKET, BY REGION, 2021-2028 (USD MILLION)	140
TABLE 20	NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR HARDWARE, BY COUNTRY, 2021-2028 (USD MILLION)	140
TABLE 21	EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR HARDWARE, BY COUNTRY, 2021-2028 (USD MILLION)	141
TABLE 22	ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR HARDWARE, BY COUNTRY, 2021-2028 (USD MILLION)	141
TABLE 23	LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR HARDWARE, BY COUNTRY, 2021-2028 (USD MILLION)	142
TABLE 24	MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR HARDWARE, BY COUNTRY, 2021-2028 (USD MILLION)	142
6.2.2	IN-ROOM TELEVISIONS	142
6.2.2.1	Increase in adoption of in-room televisions by hospitals	142
TABLE 25	IN-ROOM TELEVISIONS MARKET, BY REGION, 2021-2028 (USD MILLION)	143
TABLE 26	NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR IN-ROOM TELEVISIONS, BY COUNTRY, 2021-2028 (USD MILLION)	143
TABLE 27	EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR IN-ROOM TELEVISIONS, BY COUNTRY, 2021-2028 (USD MILLION)	143

TABLE 28	ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR IN-ROOM TELEVISIONS, BY COUNTRY, 2021-2028 (USD MILLION)	144
TABLE 29	LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR IN-ROOM TELEVISIONS, BY COUNTRY, 2021-2028 (USD MILLION)	144
TABLE 30	MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR IN-ROOM TELEVISIONS, BY COUNTRY, 2021-2028 (USD MILLION)	144
6.2.3	INTEGRATED BEDSIDE TERMINALS/ASSISTED DEVICES	145
6.2.3.1	Integrated bedside terminals enhance patient experience	145
TABLE 31	INTEGRATED BEDSIDE TERMINALS/ASSISTED DEVICES MARKET, BY REGION, 2021-2028 (USD MILLION)	145
TABLE 32	NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR INTEGRATED BEDSIDE TERMINALS/ASSISTED DEVICES, BY COUNTRY, 2021-2028 (USD MILLION)	145
TABLE 33	EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR INTEGRATED BEDSIDE TERMINALS/ASSISTED DEVICES, BY COUNTRY, 2021-2028 (USD MILLION)	146
TABLE 34	ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR INTEGRATED BEDSIDE TERMINALS/ASSISTED DEVICES, BY COUNTRY, 2021-2028 (USD MILLION)	146
TABLE 35	LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR INTEGRATED BEDSIDE TERMINALS/ASSISTED DEVICES, BY COUNTRY, 2021-2028 (USD MILLION)	147
TABLE 36	MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR INTEGRATED BEDSIDE TERMINALS/ASSISTED DEVICES, BY COUNTRY, 2021-2028 (USD MILLION)	147
6.2.4	TABLETS	147
6.2.4.1	Portability and cost-effectiveness of tablets support growth	147
TABLE 37	TABLETS MARKET, BY REGION, 2021-2028 (USD MILLION)	148
TABLE 38	NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR TABLETS, BY COUNTRY, 2021-2028 (USD MILLION)	148
TABLE 39	EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR TABLETS, BY COUNTRY, 2021-2028 (USD MILLION)	149
TABLE 40	ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR TABLETS, BY COUNTRY, 2021-2028 (USD MILLION)	149
TABLE 41	LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR TABLETS, BY COUNTRY, 2021-2028 (USD MILLION)	150
TABLE 42	MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR TABLETS, BY COUNTRY, 2021-2028 (USD MILLION)	150
6.3	SOFTWARE	150
TABLE 43	SOFTWARE MARKET, BY TYPE, 2021-2028 (USD MILLION)	151
TABLE 44	SOFTWARE MARKET, BY REGION, 2021-2028 (USD MILLION)	151
TABLE 45	NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR SOFTWARE, BY COUNTRY, 2021-2028 (USD MILLION)	151
TABLE 46	EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR SOFTWARE, BY COUNTRY, 2021-2028 (USD MILLION)	152
TABLE 47	ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR SOFTWARE, BY COUNTRY, 2021-2028 (USD MILLION)	152
TABLE 48	LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR SOFTWARE, BY COUNTRY, 2021-2028 (USD MILLION)	153
TABLE 49	MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR SOFTWARE, BY COUNTRY, 2021-2028 (USD MILLION)	153
6.3.1	STANDALONE SOFTWARE	153
6.3.1.1	Standalone software refers to traditional software installed in client systems	153
TABLE 50	STANDALONE SOLUTIONS MARKET, BY REGION, 2021-2028 (USD MILLION)	154
TABLE 51	NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR STANDALONE SOLUTIONS, BY COUNTRY, 2021-2028 (USD MILLION)	154
TABLE 52	EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR STANDALONE SOLUTIONS, BY COUNTRY, 2021-2028 (USD MILLION)	155

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TABLE 53 □ ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR STANDALONE SOLUTIONS, BY COUNTRY, 2021-2028 (USD MILLION) □ 155

TABLE 54 □ LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR STANDALONE SOLUTIONS, BY COUNTRY, 2021-2028 (USD MILLION) □ 156

TABLE 55 □ MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR STANDALONE SOLUTIONS, BY COUNTRY, 2021-2028 (USD MILLION) □ 156

6.3.2 □ INTEGRATED SOFTWARE □ 156

6.3.2.1 □ Reduction in time spent on data management to drive growth □ 156

TABLE 56 □ INTEGRATED SOLUTIONS MARKET, BY REGION, 2021-2028 (USD MILLION) □ 157

TABLE 57 □ NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR INTEGRATED SOLUTIONS, BY COUNTRY, 2021-2028 (USD MILLION) □ 157

TABLE 58 □ EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR INTEGRATED SOLUTIONS, BY COUNTRY, 2021-2028 (USD MILLION) □ 158

TABLE 59 □ ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR INTEGRATED SOLUTIONS, BY COUNTRY, 2021-2028 (USD MILLION) □ 158

TABLE 60 □ LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR INTEGRATED SOLUTIONS, BY COUNTRY, 2021-2028 (USD MILLION) □ 159

TABLE 61 □ MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR INTEGRATED SOLUTIONS, BY COUNTRY, 2021-2028 (USD MILLION) □ 159

6.4 □ SERVICES □ 159

TABLE 62 □ SERVICES MARKET, BY REGION, 2021-2028 (USD MILLION) □ 160

TABLE 63 □ NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR SERVICES, BY COUNTRY, 2021-2028 (USD MILLION) □ 160

TABLE 64 □ EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR SERVICES, BY COUNTRY, 2021-2028 (USD MILLION) □ 161

TABLE 65 □ ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR SERVICES, BY COUNTRY, 2021-2028 (USD MILLION) □ 161

TABLE 66 □ LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR SERVICES, BY COUNTRY, 2021-2028 (USD MILLION) □ 162

TABLE 67 □ MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR SERVICES, BY COUNTRY, 2021-2028 (USD MILLION) □ 162

7 □ PATIENT ENGAGEMENT SOLUTIONS MARKET, BY DELIVERY MODE □ 163

7.1 □ INTRODUCTION □ 164

TABLE 68 □ PATIENT ENGAGEMENT SOLUTIONS MARKET, BY DELIVERY MODE, 2021-2028 (USD MILLION) □ 164

7.2 □ ON-PREMISE MODE □ 164

7.2.1 □ PATIENT DATA SAFETY AND COST BENEFITS TO DRIVE MARKET □ 164

TABLE 69 □ ON-PREMISE MODE MARKET, BY REGION, 2021-2028 (USD MILLION) □ 165

TABLE 70 □ NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR ON-PREMISE MODE, BY COUNTRY, 2021-2028 (USD MILLION) □ 165

TABLE 71 □ EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR ON-PREMISE MODE, BY COUNTRY, 2021-2028 (USD MILLION) □ 166

TABLE 72 □ ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR ON-PREMISE MODE, BY COUNTRY, 2021-2028 (USD MILLION) □ 166

TABLE 73 □ LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR ON-PREMISE MODE, BY COUNTRY, 2021-2028 (USD MILLION) □ 167

TABLE 74 □ MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR ON-PREMISE MODE, BY COUNTRY, 2021-2028 (USD MILLION) □ 167

7.3 □ CLOUD-BASED/ WEB-BASED MODE □ 167

7.3.1 □ REGULATORY REQUIREMENTS DRIVE HEALTHCARE PROVIDERS TO ADOPT CLOUD-BASED SOLUTIONS □ 167

TABLE 75 □ CLOUD-BASED/WEB-BASED MODE MARKET, BY REGION, 2021-2028 (USD MILLION) □ 168

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TABLE 76	NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR CLOUD-BASED MODE, BY COUNTRY, 2021-2028 (USD MILLION)	169
TABLE 77	EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR CLOUD-BASED MODE, BY COUNTRY, 2021-2028 (USD MILLION)	169
TABLE 78	ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR CLOUD-BASED MODE, BY COUNTRY, 2021-2028 (USD MILLION)	169
TABLE 79	LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR CLOUD-BASED MODE, BY COUNTRY, 2021-2028 (USD MILLION)	170
TABLE 80	MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR CLOUD-BASED MODE, BY COUNTRY, 2021-2028 (USD MILLION)	170
8	PATIENT ENGAGEMENT SOLUTIONS MARKET, BY APPLICATION	171
8.1	INTRODUCTION	172
TABLE 81	PATIENT ENGAGEMENT SOLUTIONS MARKET, BY APPLICATION, 2021-2028 (USD MILLION)	172
8.2	HEALTH MANAGEMENT	172
8.2.1	HEALTH MANAGEMENT PLAYS CRUCIAL TOOL IN GUIDING PATIENTS IN SELF-CARE	172
TABLE 82	PATIENT ENGAGEMENT SOLUTIONS MARKET FOR HEALTH MANAGEMENT, BY REGION, 2021-2028 (USD MILLION)	173
TABLE 83	NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR HEALTH MANAGEMENT, BY COUNTRY, 2021-2028 (USD MILLION)	173
TABLE 84	EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR HEALTH MANAGEMENT, BY COUNTRY, 2021-2028 (USD MILLION)	174
TABLE 85	ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR HEALTH MANAGEMENT, BY COUNTRY, 2021-2028 (USD MILLION)	174
TABLE 86	LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR HEALTH MANAGEMENT, BY COUNTRY, 2021-2028 (USD MILLION)	175
TABLE 87	MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR HEALTH MANAGEMENT, BY COUNTRY, 2021-2028 (USD MILLION)	175
8.3	HOME HEALTH MANAGEMENT	175
8.3.1	GROWING PREFERENCE FOR HOME HEALTHCARE TO SUPPORT MARKET GROWTH	175
TABLE 88	PATIENT ENGAGEMENT SOLUTIONS MARKET FOR HOME HEALTH MANAGEMENT, BY REGION, 2021-2028 (USD MILLION)	176
TABLE 89	NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR HOME HEALTH MANAGEMENT, BY COUNTRY, 2021-2028 (USD MILLION)	176
TABLE 90	EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR HOME HEALTH MANAGEMENT, BY COUNTRY, 2021-2028 (USD MILLION)	177
TABLE 91	ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR HOME HEALTH MANAGEMENT, BY COUNTRY, 2021-2028 (USD MILLION)	177
TABLE 92	LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR HOME HEALTH MANAGEMENT, BY COUNTRY, 2021-2028 (USD MILLION)	178
TABLE 93	MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR HOME HEALTH MANAGEMENT, BY COUNTRY, 2021-2028 (USD MILLION)	178
8.4	SOCIAL & BEHAVIORAL MANAGEMENT	178
8.4.1	GROWING POPULARITY OF SOCIAL MEDIA TO DRIVE MARKET GROWTH	178
TABLE 94	PATIENT ENGAGEMENT SOLUTIONS MARKET FOR SOCIAL & BEHAVIORAL MANAGEMENT, BY REGION, 2021-2028 (USD MILLION)	179
TABLE 95	NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR SOCIAL & BEHAVIORAL MANAGEMENT, BY COUNTRY, 2021-2028 (USD MILLION)	179
TABLE 96	EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR SOCIAL & BEHAVIORAL MANAGEMENT, BY COUNTRY,	

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2021-2028 (USD MILLION) 180

TABLE 97 ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR SOCIAL & BEHAVIORAL MANAGEMENT, BY COUNTRY, 2021-2028 (USD MILLION) 180

TABLE 98 LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR SOCIAL & BEHAVIORAL MANAGEMENT, BY COUNTRY, 2021-2028 (USD MILLION) 181

TABLE 99 MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR SOCIAL & BEHAVIORAL MANAGEMENT, BY COUNTRY, 2021-2028 (USD MILLION) 181

8.5 FINANCIAL HEALTH MANAGEMENT 181

8.5.1 FINANCIAL ENGAGEMENT SOLUTIONS HELP PROVIDERS MANAGE PATIENT PAYMENTS 181

TABLE 100 PATIENT ENGAGEMENT SOLUTIONS MARKET FOR FINANCIAL HEALTH MANAGEMENT, BY REGION, 2021-2028 (USD MILLION) 182

TABLE 101 NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR FINANCIAL HEALTH MANAGEMENT, BY COUNTRY, 2021-2028 (USD MILLION) 182

TABLE 102 EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR FINANCIAL HEALTH MANAGEMENT, BY COUNTRY, 2021-2028 (USD MILLION) 183

TABLE 103 ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR FINANCIAL HEALTH MANAGEMENT, BY COUNTRY, 2021-2028 (USD MILLION) 183

TABLE 104 LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR FINANCIAL HEALTH MANAGEMENT, BY COUNTRY, 2021-2028 (USD MILLION) 184

TABLE 105 MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR FINANCIAL HEALTH MANAGEMENT, BY COUNTRY, 2021-2028 (USD MILLION) 184

9 PATIENT ENGAGEMENT SOLUTIONS MARKET, BY THERAPEUTIC AREA 185

9.1 INTRODUCTION 186

TABLE 106 PATIENT ENGAGEMENT SOLUTIONS MARKET, BY THERAPEUTIC AREA, 2021-2028 (USD MILLION) 186

9.2 CHRONIC DISEASES 186

TABLE 107 PATIENT ENGAGEMENT SOLUTIONS MARKET FOR CHRONIC DISEASES, BY REGION, 2021-2028 (USD MILLION) 187

TABLE 108 PATIENT ENGAGEMENT SOLUTIONS MARKET FOR CHRONIC DISEASES, BY TYPE, 2021-2028 (USD MILLION) 187

TABLE 109 NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR CHRONIC DISEASES, BY COUNTRY, 2021-2028 (USD MILLION) 187

TABLE 110 EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR CHRONIC DISEASES, BY COUNTRY, 2021-2028 (USD MILLION) 188

TABLE 111 ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR CHRONIC DISEASES, BY COUNTRY, 2021-2028 (USD MILLION) 188

TABLE 112 LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR CHRONIC DISEASES, BY COUNTRY, 2021-2028 (USD MILLION) 189

TABLE 113 MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR CHRONIC DISEASES, BY COUNTRY, 2021-2028 (USD MILLION) 189

9.2.1 CARDIOVASCULAR DISEASES (CVD) 189

9.2.1.1 Leading cause of death worldwide 189

TABLE 114 PATIENT ENGAGEMENT SOLUTIONS MARKET FOR CARDIOVASCULAR DISEASES, BY REGION, 2021-2028 (USD MILLION) 190

TABLE 115 NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR CARDIOVASCULAR DISEASES, BY COUNTRY, 2021-2028 (USD MILLION) 190

TABLE 116 EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR CARDIOVASCULAR DISEASES, BY COUNTRY, 2021-2028 (USD MILLION) 191

TABLE 117 ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR CARDIOVASCULAR DISEASES, BY COUNTRY, 2021-2028 (USD MILLION) 191

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TABLE 118	LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR CARDIOVASCULAR DISEASES, BY COUNTRY, 2021-2028 (USD MILLION)	192
TABLE 119	MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR CARDIOVASCULAR DISEASES, BY COUNTRY, 2021-2028 (USD MILLION)	192
9.2.2	DIABETES	192
9.2.2.1	High incidence of diabetes worldwide drives growth	192
TABLE 120	PATIENT ENGAGEMENT SOLUTIONS MARKET FOR DIABETES, BY REGION, 2021-2028 (USD MILLION)	193
TABLE 121	NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR DIABETES, BY COUNTRY, 2021-2028 (USD MILLION)	193
TABLE 122	EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR DIABETES, BY COUNTRY, 2021-2028 (USD MILLION)	194
TABLE 123	ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR DIABETES, BY COUNTRY, 2021-2028 (USD MILLION)	194
TABLE 124	LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR DIABETES, BY COUNTRY, 2021-2028 (USD MILLION)	195
TABLE 125	MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR DIABETES, BY COUNTRY, 2021-2028 (USD MILLION)	195
9.2.3	OBESITY	195
9.2.3.1	Rising prevalence of obesity to drive growth	195
TABLE 126	PATIENT ENGAGEMENT SOLUTIONS MARKET FOR OBESITY, BY REGION, 2021-2028 (USD MILLION)	196
TABLE 127	NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR OBESITY, BY COUNTRY, 2021-2028 (USD MILLION)	196
TABLE 128	EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR OBESITY, BY COUNTRY, 2021-2028 (USD MILLION)	197
TABLE 129	ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR OBESITY, BY COUNTRY, 2021-2028 (USD MILLION)	197
TABLE 130	LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR OBESITY, BY COUNTRY, 2021-2028 (USD MILLION)	198
TABLE 131	MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR OBESITY, BY COUNTRY, 2021-2028 (USD MILLION)	198
9.2.4	OTHER CHRONIC DISEASES	198
TABLE 132	PATIENT ENGAGEMENT SOLUTIONS MARKET FOR OTHER CHRONIC DISEASES, BY REGION, 2021-2028 (USD MILLION)	199
TABLE 133	NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR OTHER CHRONIC DISEASES, BY COUNTRY, 2021-2028 (USD MILLION)	199
TABLE 134	EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR OTHER CHRONIC DISEASES, BY COUNTRY, 2021-2028 (USD MILLION)	200
TABLE 135	ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR OTHER CHRONIC DISEASES, BY COUNTRY, 2021-2028 (USD MILLION)	200
TABLE 136	LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR OTHER CHRONIC DISEASES, BY COUNTRY, 2021-2028 (USD MILLION)	201
TABLE 137	MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR OTHER CHRONIC DISEASES, BY COUNTRY, 2021-2028 (USD MILLION)	201
9.3	WOMEN'S HEALTH	201
9.3.1	INCREASING SELF-AWARENESS FOR MANAGEMENT OF DISEASES TO DRIVE MARKET	201
TABLE 138	PATIENT ENGAGEMENT SOLUTIONS MARKET FOR WOMEN'S HEALTH, BY REGION, 2021-2028 (USD MILLION)	202
TABLE 139	NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR WOMEN'S HEALTH, BY COUNTRY, 2021-2028 (USD MILLION)	202
TABLE 140	EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR WOMEN'S HEALTH, BY COUNTRY, 2021-2028 (USD MILLION)	203
TABLE 141	ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR WOMEN'S HEALTH, BY COUNTRY, 2021-2028 (USD MILLION)	203
TABLE 142	LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR WOMEN'S HEALTH, BY COUNTRY, 2021-2028 (USD	

MILLION) 204

TABLE 143 MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR WOMEN'S HEALTH, BY COUNTRY, 2021-2028 (USD MILLION) 204

9.4 FITNESS 204

9.4.1 GROWING PREFERENCE FOR HEALTHY LIFESTYLE TO SUPPORT MARKET GROWTH 204

TABLE 144 PATIENT ENGAGEMENT SOLUTIONS MARKET FOR FITNESS, BY REGION, 2021-2028 (USD MILLION) 205

TABLE 145 NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR FITNESS, BY COUNTRY, 2021-2028 (USD MILLION) 205

TABLE 146 EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR FITNESS, BY COUNTRY, 2021-2028 (USD MILLION) 206

TABLE 147 ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR FITNESS, BY COUNTRY, 2021-2028 (USD MILLION) 206

TABLE 148 LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR FITNESS, BY COUNTRY, 2021-2028 (USD MILLION) 207

TABLE 149 MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR FITNESS, BY COUNTRY, 2021-2028 (USD MILLION) 207

9.5 OTHER THERAPEUTIC AREAS 207

TABLE 150 PATIENT ENGAGEMENT SOLUTIONS MARKET FOR OTHER THERAPEUTIC AREAS, BY REGION, 2021-2028 (USD MILLION) 208

TABLE 151 NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR OTHER THERAPEUTIC AREAS, BY COUNTRY, 2021-2028 (USD MILLION) 208

TABLE 152 EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR OTHER THERAPEUTIC AREAS, BY COUNTRY, 2021-2028 (USD MILLION) 209

TABLE 153 ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR OTHER THERAPEUTIC AREAS, BY COUNTRY, 2021-2028 (USD MILLION) 209

TABLE 154 LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR OTHER THERAPEUTIC AREAS, BY COUNTRY, 2021-2028 (USD MILLION) 210

TABLE 155 MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR OTHER THERAPEUTIC AREAS, BY COUNTRY, 2021-2028 (USD MILLION) 210

10 PATIENT ENGAGEMENT SOLUTIONS MARKET, BY FUNCTIONALITY 211

10.1 INTRODUCTION 212

TABLE 156 PATIENT ENGAGEMENT SOLUTIONS MARKET, BY FUNCTIONALITY, 2021-2028 (USD MILLION) 212

10.2 PATIENT/CLIENT SCHEDULING 212

10.2.1 STREAMLINING OF WORKFLOWS AND EFFICIENT MANAGEMENT OF PATIENT SCHEDULES 212

TABLE 157 PATIENT ENGAGEMENT SOLUTIONS MARKET FOR PATIENT/CLIENT SCHEDULING, BY REGION, 2021-2028 (USD MILLION) 213

TABLE 158 NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR PATIENT/CLIENT SCHEDULING, BY COUNTRY, 2021-2028 (USD MILLION) 213

TABLE 159 EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR PATIENT/CLIENT SCHEDULING, BY COUNTRY, 2021-2028 (USD MILLION) 214

TABLE 160 ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR PATIENT/CLIENT SCHEDULING, BY COUNTRY, 2021-2028 (USD MILLION) 214

TABLE 161 LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR PATIENT/CLIENT SCHEDULING, BY COUNTRY, 2021-2028 (USD MILLION) 215

TABLE 162 MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR PATIENT/CLIENT SCHEDULING, BY COUNTRY, 2021-2028 (USD MILLION) 215

10.3 TELEHEALTH 215

10.3.1 FLEXIBILITY IN TREATMENT OPTIONS DUE TO REMOTE MONITORING 215

TABLE 163 PATIENT ENGAGEMENT SOLUTIONS MARKET FOR TELEHEALTH, BY REGION, 2021-2028 (USD MILLION) 216

TABLE 164 NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR TELEHEALTH, BY COUNTRY, 2021-2028 (USD

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MILLION) 216

TABLE 165 EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR TELEHEALTH, BY COUNTRY, 2021-2028 (USD MILLION) 217

TABLE 166 ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR TELEHEALTH, BY COUNTRY, 2021-2028 (USD MILLION) 217

TABLE 167 LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR TELEHEALTH, BY COUNTRY, 2021-2028 (USD MILLION) 218

TABLE 168 MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR TELEHEALTH, BY COUNTRY, 2021-2028 (USD MILLION) 218

10.4 E-PRESCRIBING 218

10.4.1 COST-EFFECTIVE METHOD TO ENHANCE DECISION-MAKING 218

TABLE 169 PATIENT ENGAGEMENT SOLUTIONS MARKET FOR E-PRESCRIBING, BY REGION, 2021-2028 (USD MILLION) 219

TABLE 170 NORTH AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR E-PRESCRIBING, BY COUNTRY, 2021-2028 (USD MILLION) 219

TABLE 171 EUROPE: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR E-PRESCRIBING, BY COUNTRY, 2021-2028 (USD MILLION) 220

TABLE 172 ASIA PACIFIC: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR E-PRESCRIBING, BY COUNTRY, 2021-2028 (USD MILLION) 220

TABLE 173 LATIN AMERICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR E-PRESCRIBING, BY COUNTRY, 2021-2028 (USD MILLION) 221

TABLE 174 MIDDLE EAST & AFRICA: PATIENT ENGAGEMENT SOLUTIONS MARKET FOR E-PRESCRIBING, BY COUNTRY, 2021-2028 (USD MILLION) 221

Patient Engagement Solutions Market by Component (Hardware (Tablet)), Software (Integrated), Therapy (CVD, Diabetes), Functionality (Education, Scheduling), User (Provider, Payer (Public)), Unmet Need, Investment, Buying Criteria - Global Forecast to 2028

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