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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

Market Report | 2023-12-15 | 438 pages | MarketsandMarkets

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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.

"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

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 majors regions.

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

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

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