

EHealth - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The EHealth Market size is estimated at USD 236.47 billion in 2024, and is expected to reach USD 497.02 billion by 2029, growing at a CAGR of 16.02% during the forecast period (2024-2029).

COVID-19 has impacted the eHealth market owing to market players' increased launches of telemedicine and other eHealth solutions for COVID-19 contact tracing and consultations during the isolation period. For instance, according to an article published in the International Journal of Medical Informatics in June 2022, an online survey of Japanese healthcare providers carried out from January 25 to February 22, 2021, reported that 73.3% of care delivery institutions used electronic medical records and 57.8% of the EMRs were connected to an external network that helps in sharing the regional health information with other hospitals (22.0%), report online medical insurance claims (27.5%), and conduct intrahospital system maintenance (61.5%). Hence, the use of e-health was at its peak during the pandemic. The eHealth market is growing due to its increasing adoption because of COVID-19 and is expected to register a significant growth rate during the forecast period.

The propelling factors for the growth of the e-health market include the growth in IoT and technological innovations, rising preference toward mobile technology and the internet, and rising demand for population health management. For instance, according to an article published in Digital Health in August 2022, the digital health transition in numerous healthcare facilities throughout Saudi Arabia was assessed utilizing digital health indicators. The total digital transformation score in private healthcare facilities was observed to be higher than in governmental hospitals due to greater implementation rates. Thus, the high adoption of digital health systems across private healthcare facilities is expected to increase market growth over the forecast period.

The government initiatives for the rising preference toward mobile technology and the internet are also expected to propel

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market growth. For instance, in May 2022, Israel approved 19 initiatives for USD 30 million for a new digital health initiative enabling healthcare institutions, including HMOs, hospitals, and institutes, to develop the digital infrastructure needed for collaborative R&D projects with start-ups in the field of healthcare.

The technological advancement in e-health solutions, product launches, and partnerships by market players is expected to propel market growth during the forecast period. For instance, in May 2022, Brazil's digital health company, Memed, launched a set of digitally integrated care pathways that allow patients to purchase medication online directly from a Memed e-prescription. Furthermore, in January 2022, Visionflex partnered with MediRecords, Australia's cloud-based electronic medical record and practice management systems provider. The partnership is aimed to integrate Visionflex's video conferencing platform, Vision, with MediRecords' cloud-based electronic health record and practice management software platforms.

Therefore, the studied market is anticipated to witness growth over the analysis period due to the factors such as rising launches, partnerships, and fundraising for the expansions of eHealth solutions by market players. However, the concerns over data security, the lack of reimbursement policies in emerging markets, and the lack of proper infrastructure for eHealth in emerging markets are estimated to restrain the market growth.

eHealth Market Trends

e-Prescribing Segment is Expected to Hold a Significant Market Share Over The Forecast Period

E-prescribing or electronic prescribing is a technology framework that allows physicians and other medical practitioners to write and send prescriptions to a participating pharmacy in an electronic format instead of using written prescriptions.

The segment is expected to grow during the forecast period owing to the rising demand for e-prescriptions due to the minimization of prescription errors, cost reduction, and increasing technological advancements and launches by market players. For instance, according to an article published in the British medical journal in December 2022, adverse drug events and medication errors are common among the aging population in nursing homes in Japan. The rising focus on reducing the abuse of controlled substances and increasing focus on reducing medical errors will accelerate the adoption of an e-prescribing system in the forecast period.

Furthermore, the rising government initiatives leading to an increase in the utility of e-prescription are significantly adding to the segment's growth. For instance, in August 2022, the Japanese Ministry of Health, Labour, and Welfare selected four pilot sites for its electronic prescription project. This came ahead of the formal launch of e-prescriptions across the country in January 2023. Furthermore, in September 2021, the Prime Minister rolled out the Pradhan Mantri Digital Health Mission in India. It aimed to digitalize healthcare practices nationwide, creating a country-wide digital health ecosystem and enabling patients to store, access, and consent to share health records.

Moreover, the strategic initiatives by market players for expansions of e-prescription solutions are expected to propel the segment's growth. For instance, in January 2023, the Qatar-based HealthTech startup At Home Doc raised USD 1.9 million in Pre-Series A funding led by Elaj Group's investment arm Tawasol Holdings, endorsed by Qatar Development Bank (QDB) and other angel investors. In June 2022, the Hamad Medical Corporation (HMC) and Primary Health Care Corporation (PHCC) announced adopting Cerner-managed technology to deliver better outcomes in Qatar. The funding will be utilized to enhance electronic prescription solutions in the country.

Thus, the market segment is expected to witness significant growth during the forecast period due to the abovementioned factors.

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The North American Region Holds the Significant Market Share and is Expected to Follow the Same Trend Over the Forecast Period

The rising focus on patient care and need, supported by the well-developed and technologically advanced healthcare system, the increasing demand for more effective data management systems, and increasing partnerships, acquisitions, and product launches in the region, is expected to drive the growth of the eHealth market in the region.

According to the National Center for Health Statistics 2021 estimates, 89.9% of office-based physicians in the United States used any EMR/EHR system, and 72.3% used a certified EMR/EHR system. The high adoption of EMRs in the region is projected to propel the utility of eHealth solutions during the forecast period.

Furthermore, the rising launches, partnerships, and increasing adoption of electronic health solutions in the region are expected to propel the market growth. For instance, in March 2022, Cantata Health Solutions reported that the Village Network would deploy its Arize Electronic Health Record (EHR) to leverage its superior configuration, outcomes-based reporting, and mobile access capabilities. In May 2022, Cantata Health Solutions was selected by Mental Health Resources (MHR) in New Mexico as its technology partner and will deploy the Arize Electronic Health Record (EHR) solution.

Additionally, in October 2021, Allscripts Healthcare LLC launched guided scheduling by leveraging artificial intelligence to improve patient care and increase healthcare operational efficiencies. In February 2021, Northern Inyo Healthcare District collaborated with Cerner Corporation to transform its Electronic Health Record (EHR). The collaboration involved Northern Inyo Healthcare District moving to an updated electronic system that supports physicians, nurses, and clinicians to share data across the District's multiple offices. Such collaborations will contribute to the rising adoption of eHealth in the region during the forecast period.

eHealth Industry Overview

The eHealth market is fragmented in nature due to the presence of several companies operating globally as well as regionally. The competitive landscape includes an analysis of a few international and local companies with major or significant market shares. Some of the key market players are Boston Scientific Corporation, Veradigm LLC, Oracle Cerner, Athenahealth Inc., GE Healthcare, CompuMed Inc., Epic Systems Corporation, Optum Health, Siemens Healthineers, and Koninklijke Philips NV, and eClinicalWorks.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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