

Patient Portal - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2021 - 2029

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Report description:

The Patient Portal Market size is estimated at USD 5.52 billion in 2024, and is expected to reach USD 13.07 billion by 2029, growing at a CAGR of 18.80% during the forecast period (2024-2029).

The onset of COVID-19 caused nationwide lockdowns, with the suspension of non-urgent scheduled visits and hospitalizations worldwide. The financial and technological barriers prevented some patients from accessing the technology needed for patient portal services, especially older people and patients from underdeveloped countries. Additionally, in February 2022, DC Health launched a web-based portal, 'Digital Vaccine Record (DVR),' that gives district residents secure, easy, and free access to their official COVID-19 vaccination records. DVR, an official electronic vaccination record drawn from the District of Columbia's immunization information system (DOCIIS), is accessible on smartphones, tablets, and laptops and includes a QR code. When scanned by a SMART Health Card reader, it displays the same information as the physical vaccine card provided by the Centers for Disease Control and Prevention (CDC). Thus, the government and private sectors launched new portals and services for various purposes during the pandemic. The COVID-19 pandemic had a favorable impact on the market initially; in the post-pandemic period the market has lost some traction. However, it is expected to have stable growth during the forecast period.

The patient portal market has been growing owing to the increasing adoption of the patient-centric approach of healthcare payers and the growing demand for EHR. For instance, 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 supported physicians, nurses, and clinicians to share data across the district's multiple offices. Such collaborations are expected to contribute to the rising adoption of EHRs in the United States.

Furthermore, in February 2021, Medway NHS (National Health Services) Foundation Trust adopted Allscripts Sunrise electronic

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patient records to boost its digital maturity quickly. With this, clinicians are expected to have better access to a single view of patient information with the launch of clinical papers with in-context links to other IT systems in use at the trust.

Additionally, the market players focus on market development strategies such as collaboration, partnerships, and product launches. For instance, in March 2022, Meditech and Google Health collaborated to bring search simplicity for electronic health records, which helps aggregate patient data from different settings and present a comprehensive patient view to clinicians. Thus, owing to all the factors mentioned above, the market is experiencing tremendous growth and is expected to have a high market share over the forecast period.

However, the concerns regarding data privacy and safety, coupled with the high cost of implementing and deploying these tools, are a major restraint for the market growth.

Patient Portal Market Trends

Integrated Patient Portal Holds the Largest Share in the Portal Segment expected to hold a major market share in the Patient Portalmarket

Integrated patient portals, also known as connected or tethered portals, help with a more extensive or combined system, such as a hospital management system (HMS) or electronic health record (EHR). An integrated portal directly connects to a medical facility or organization's patient database and provides various functions and services. This type of patient portal system requires more time and effort for design and is therefore associated with greater development costs.

To enhance the patient experience and increase hospital efficiency, companies are collaborating with healthcare providers to serve the large base of residents better globally. This demand for an integrated patient portal is expected to drive the segment's growth. For instance, in August 2021, Novo Integrated Sciences launched NovoConnect. This online patient portal app puts patients first and allows them to take control of their healthcare and wellness by having secure digital access to their patient charts. Similarly, in October 2021, Microsoft launched Electronic Health Record - integrated virtual care capabilities via both Epic's and Cerner's EHR systems, allowing clinicians to navigate telehealth visits easily.

The integrated setup is a very supportive web-based tool for quality improvement and performance with a range of quality and efficiency measures, which is expected to help the market grow during the forecast period.

The graph below suggests the burden of chronic diseases, such as Cancer, is anticipated to increase with high growth rates in the future, which may increase the procurement of integrated patient portals by the provider as well as the patients end to manage such a huge burden of patients, therefore the market is anticipated to witness growth, over the forecast period.

North America is Expected to Dominate the Market Over the Forecast Period

The North American patient portal market is expected to grow owing to vast technological advancements in the region. Countries such as the United States and Canada have been successful in implementing IT technologies in their healthcare systems, which as a result, may boost the market growth.

The United States is the largest market for patient portals in the North American region. Owing to the well-equipped healthcare system and the higher adoption of telemedicine, the market for the patient portal is expected to witness significant growth over the forecast period. Similarly, initiatives such as product launches are another factor in market growth. For instance, in August 2021, Novo Integrated Sciences launched NovoConnect, an online patient portal app that could put patients first and allows them to take control of their healthcare and wellness by having secure digital access to their patient charts.

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The healthcare IT industry in Canada is versatile and well-equipped. Due to the advanced healthcare system, the adoption of information technology in healthcare is as high as in the United States. In May 2022, the Orleans Health Hub brought together three hospitals and six community-based service providers to enhance care and service coordination in a highly accessible, bilingual system reflective of the local region. For a smooth, connected patient experience, the Hub consolidates various specialized and community healthcare services under one roof. With such collaborative approaches taken by Canadian organizations, there will be an increasing number of people accessing health information online, propelling the growth of the market studied in the country. Such launches are expected to increase the adoption of such portals, which is expected to boost the market growth.

Thus, the above factors are expected to drive the market's growth in this region during the forecast period.

Patient Portal Industry Overview

The Patient Portal Market is moderately competitive. In the future, few other players are expected to enter the market. The reasonably competitive landscape includes an analysis of a few international and local companies that hold the market shares and are well known, including Allscripts Healthcare Solutions, AtenaHealth Inc., Cerner Corporation, Curemd Healthcare, Eclinical works LLC, Epic Corporation Inc., GE Healthcare, Greenway Health LLC, Intelichart, McKesson Corporation, Nextgen Healthcare Information systems LLC, and others.

Additional Benefits:

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

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