

## **U.S. Revenue Cycle Management Market - Focused Insights 2025-2030**

Market Report | 2025-01-21 | 108 pages | Arizton Advisory & Intelligence

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### **Report description:**

The U.S. revenue cycle management market is expected to grow at a CAGR of 11.55% from 2024 to 2030.

### **RECENT VENDORS ACTIVITIES**

- In 2024, Leading healthcare technology and RCM company CorroHealth finalized its acquisition of the Xtend healthcare revenue cycle management business from Navient, further positioning the company as the clear leader in revenue cycle management consultancy and technology.
- In August 2024, R1 RCM announced its agreement to be acquired by private equity firms TowerBrook Capital Partners and Clayton, Dubilier & Rice in a deal valued at \$8.9 billion. The transaction is expected to close by the end of 2024.

### **KEY TAKEAWAYS**

- By Component Type: The post-cycle segment holds the largest market share of over 57%. The segment has gained importance as healthcare organizations face mounting challenges related to insurance claim rejections, compliance with changing regulations, and the need for efficient cash flow management.
- By Delivery Mode: The cloud-based segment shows the highest growth of 12.22% driven by the demand for efficiency, cost reduction, and improved patient experiences.
- By Solution Type: The integrated segment holds the largest market share due to hospitals and physician offices increasingly adopting advanced systems to address financial and operational challenges.
- By Service Type: The ambulatory care segment shows the highest growth driven by rising healthcare costs, the adoption of advanced technologies, and shifts towards value-based care.
- By End-User: The hospital segment leads the U.S. revenue cycle management market, driven by high patient volumes, diverse services, and multiple payment systems like private insurance, Medicare, and Medicaid.
- Growth Factor: The U.S. revenue cycle management market is set to grow due to the rise of generative AI and LLMs and growth in urgent care, ambulatory surgery centers, & radiology services.

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## MARKET TRENDS & DRIVERS

### Shift from Computer-Assisted Coding (CAC) to Autonomous Coding

The healthcare industry is transitioning from Computer-Assisted Coding (CAC) to Autonomous Coding due to advancements in AI and machine learning. Unlike CAC, which assists coders with code suggestions using NLP, autonomous coding fully automates the process, minimizing human involvement. This shift aims to improve efficiency, accuracy, and cost-effectiveness in medical coding and billing, addressing issues like human error, fatigue, and evolving standards. Studies highlight its growing adoption and benefits. A 2023 Frost & Sullivan report indicates that over 30% of healthcare organizations are piloting or planning autonomous coding solutions. A TruCode report reveals these systems can reduce coding time by up to 50% while enhancing accuracy. Autonomous coding is poised to revolutionize Revenue Cycle Management (RCM) by increasing operational efficiency, improving compliance, and boosting revenue collection, with AI systems becoming smarter and more adaptable over time.

### Increasing Adoption of Third-party Managed RCM Solutions

The adoption of third-party managed Revenue Cycle Management (RCM) solutions is reshaping the U.S. healthcare market as providers face financial pressures, regulatory challenges, and a shift to value-based care. Outsourcing RCM helps healthcare organizations streamline operations, improve cash flow, and reduce costs, allowing them to focus on patient care. A 2023 Healthcare IT News survey found that 40% of healthcare providers outsource RCM functions, primarily to reduce operational expenses by avoiding the costs of maintaining in-house teams. Third-party vendors bring specialized expertise in billing, coding, and collections, along with advanced technologies like automation and AI, which improve efficiency and reduce errors. A KPMG report highlights that 56% of providers are outsourcing non-core functions like RCM to prioritize clinical excellence. This trend reflects the growing preference for cost-effective, expert-driven solutions to optimize revenue cycles while focusing internal resources on delivering high-quality patient care.

## INDUSTRY RESTRAINTS

### The Role of Cybersecurity and Data Protection

Cybersecurity and data protection are major challenges in the revenue cycle management (RCM) market due to the sensitive nature of healthcare data and rising cyber threats. RCM systems handle vast amounts of personal, medical, and financial data, making them attractive targets for attacks. Compliance with regulations like HIPAA adds complexity, requiring robust safeguards to protect data and ensure operations. Many healthcare providers and RCM vendors face difficulties in addressing these risks due to limited budgets, outdated systems, and a lack of cybersecurity expertise. Threats such as ransomware, data breaches, and system downtime can disrupt the revenue cycle, causing financial losses, reputational harm, and potential legal penalties.

## SEGMENTATION INSIGHTS

### INSIGHTS BY COMPONENT TYPE

The U.S. revenue cycle management market by component type is segmented into post-cycle, pre-cycle, and mid-cycle. In 2024, the post-cycle segment accounted for the largest market share of over 57%. The segment is driven by evolving regulatory requirements, technological advancements, and increasing financial pressures on healthcare providers. This phase, which emphasizes claims submission, denial management, and collections, is crucial for optimizing revenue and ensuring financial stability. A key trend in this area is the growing reliance on automation and artificial intelligence (AI) to streamline processes. AI-driven tools are being leveraged to reduce claim denials by identifying errors in claim submissions and automatically

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suggesting corrections. Additionally, outsourcing RCM services is gaining popularity, particularly among smaller healthcare practices. Third-party RCM providers offer specialized expertise in managing complex billing and coding requirements, ensuring compliance with regulatory updates, and improving cash flow. This approach enables healthcare organizations to allocate more resources to patient care rather than administrative tasks.

#### By Component Type

- Post-cycle
- Pre-cycle
- Mid-cycle

#### INSIGHTS BY DELIVERY MODE

The U.S. revenue cycle management market by delivery mode is categorized into cloud-based and on-premises. The cloud-based segment shows significant growth, with the fastest-growing CAGR of 12.22% during the forecast period. Cloud-based Revenue Cycle Management (RCM) solutions are transforming healthcare financial operations in the U.S. driven by the demand for efficiency, cost reduction, and improved patient experiences. In 2024, these solutions are expected to witness significant growth, fueled by advancements in automation, AI, and cybersecurity. The shift toward cloud-based RCM systems is accelerating due to their scalability and cost-effectiveness. These platforms enable healthcare providers to streamline workflows like billing, coding, and claims management while ensuring interoperability with insurers and other stakeholders. By integrating advanced AI and data analytics, these systems help reduce claim denials and improve revenue recovery. For instance, many organizations now use predictive analytics to identify denial patterns, optimize claims processes, and enhance overall operational efficiency.

#### By Delivery Mode

- Cloud-based
- On-premises

#### INSIGHT BY SOLUTION TYPE

Based on the solution type, the integrated segment holds the largest market share of the U.S. revenue cycle management market. Integrated revenue cycle management (RCM) in the U.S. healthcare sector is rapidly evolving as hospitals and physician offices increasingly adopt advanced systems to address financial and operational challenges. With a growing emphasis on efficiency, patient-centered care, and financial sustainability, RCM solutions have become essential for streamlining billing processes, reducing claim denials, and improving revenue predictability. The transition to cloud-based RCM platforms is gaining momentum, providing scalability and real-time data insights. Additionally, the adoption of AI for predictive analytics, insurance verification, and denial management is expected to accelerate. Currently, only 16% of hospitals leverage AI in their RCM processes, highlighting substantial growth opportunities in this area. Another notable trend is the integration of RCM systems with value-based care models, as hospitals increasingly rely on data analytics to eliminate inefficiencies and enhance coding accuracy. These advancements underscore the critical role of RCM in driving the healthcare administration.

#### By Solution Type

- Integrated
- Standalone

#### INSIGHTS BY SERVICE TYPE

Based on the service type, the ambulatory care segment shows prominent growth, with the fastest-growing CAGR during the forecast period. The complexity of healthcare billing is increasingly influenced by the growing financial responsibility of patients.

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As high-deductible health plans and cost-sharing arrangements become more common, healthcare providers are prioritizing strategies to enhance patient payment collection. This shift is largely driven by rising healthcare costs, the adoption of advanced technologies, and the transition toward value-based care. One of the key trends is the increased focus on automation and AI to reduce administrative burdens. Technologies like robotic process automation (RPA) and predictive analytics are gaining ground, especially in areas like coding, claim denial management, and eligibility verification. These innovations not only improve efficiency but also help mitigate errors and reduce revenue loss caused by manual processes.

#### By Service Type

- Ambulatory Care
- Acute Care
- Post Acute Care

#### INSIGHTS BY END-USER

Based on the end-user, the hospital segment dominates and holds the largest share of the U.S. revenue cycle management market. RCM systems are becoming increasingly vital for hospitals in the U.S. as they navigate a rapidly evolving healthcare landscape. These solutions are designed to improve financial processes, enhance operational efficiencies, and address critical challenges such as rising claim denials, workforce shortages, and the complexities of value-based care models. Hospitals are increasingly adopting artificial intelligence (AI) and machine learning (ML) technologies to automate routine tasks and optimize workflows. These technologies excel in areas such as claims processing, medical coding, eligibility verification, and denial management?tasks that are often time-intensive and prone to errors. AI-driven tools are proving particularly valuable in preventing errors that lead to denials, with some systems even automating the coding process to minimize manual input and improve accuracy.

#### By End-User

- Hospitals
- Physician Offices
- Others

#### COMPETITIVE LANDSCAPE

The U.S. revenue cycle management market report consists of exclusive data on 55 vendors. The market is a dynamic and competitive landscape characterized by a growing demand for technology-driven solutions, consolidation among players, and the emergence of new entrants leveraging advanced technologies like artificial intelligence (AI) and automation. Companies like Change Healthcare, Epic Systems Corporation, Experian, McKesson Corporation, Oracle, R1 RCM, Veradigm, and SSI Group dominate the RCM market, offering end-to-end solutions for billing, claims management, and regulatory compliance. These companies have longstanding relationships with large healthcare providers and are expanding their portfolios through acquisitions and partnerships to stay ahead in the market.

#### Key Vendors

- Change Healthcare
- Epic Systems Corporation
- Experian
- McKesson Corporation
- Oracle
- R1 RCM
- Veradigm

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-[]SSI Group

#### Other Prominent Vendors

- []Abax Health
- []Access Healthcare
- []Acrologic Business Solutions
- []AdvancedMD
- []Advantum Health
- []AdvantEdge Healthcare Solutions
- []AKASA
- []Bellmedex
- []Bizmatics
- []Cantata Health Solutions
- []CareCloud
- []Cognizant
- []Cosentus
- []Coronis Health
- []The Craneware Group
- []CorroHealth
- []CureMD Healthcare
- []Data Marshall
- []DrChrono
- []EHealthSource
- []Greenway Health
- []Qualifacts
- []IntelliRCM
- []Tebra
- []Medical Billers and Coders
- []MGSI
- []MRO Corp
- []NextGen Healthcare
- []OSP
- []Persistent Systems
- []PMMC
- []Promantra
- []Quadax
- []QWay Healthcare
- []Rectangle Health
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- []Unified Health Services

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#### KEY QUESTIONS ANSWERED:

- 1.□How big is the U.S. revenue cycle management market?
- 2.□What is the growth rate of the U.S. revenue cycle management market?
- 3.□What are the latest trends in the US revenue cycle management market?
- 4.□Which component has the largest share of the US revenue cycle management market?
- 5.□Who are the key players in the U.S. revenue cycle management market?

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