Global Patient Portals Market - Focused Insights 2025-2030

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Report description:

The global patient portals market is expected to grow at a CAGR of 13.46% from 2024 to 2030.

RECENT VENDORS ACTIVITIES

-Recent Acquisition: In 2022, Oracle acquired Cerner which was a pioneer in the development of EHRs and patient portal systems.
-In 2022, United HealthGroup's Optum division acquired one of the largest market players Change Healthcare with a USD 13 billion transaction. This is one of the major acquisitions registered in the market and it strengthens the market position of United HealthGroup.
-In 2021, Harris Acquired Bizmatics and offered Patient portals.

KEY TAKEAWAYS

-By Product: The integrated segment holds the largest market share. This is because patient portals are integrated with EHRs/EMRs that provide complete health information with added benefits in comparison with standalone patient portals.
-By Software: The custom development segment shows the highest growth of 13.87%. The segment is driven by specialized features, such as improved communication, personalized information-sharing capabilities, and improved patient adherence.
-By Delivery Mode: The cloud & web-based delivery mode segment accounts for the largest market share in 2024 as it is considered a more promising method as it offers several features, including easy access, real-time data sharing, and improved patient engagement.
-By End User: The hospital segment holds the largest market share of over 40% in 2024, driven by the wide adoption of patient portals with growing awareness and the increasing need for managing health information.
-By Geography: North America dominates the global patient portal market with the largest share of over 34% in 2024. The region has shown promising and continued market growth with the development in healthcare sectors, rising awareness and acceptance of patient portals, and mandatory integration of EHRs.
-Growth Factor: The global patient portals market is set to grow due to the emergence of smart technologies in patient portals and

the shift from desktop-based to mobile-first design patient portals.

MARKET TRENDS & DRIVERS

Emergence of Smart Technologies in Patient Portals
Worldwide, the healthcare industry is becoming more and more advanced, of these patient portals are not left behind. The continued developments in patient portals show that the future of patient portals is likely to involve more advanced technologies and personalized features. Advanced technologies, such as Artificial Intelligence (AI) and Machine Learning (ML) help to improve patient care with patient portals. AI and ML help providers identify patterns in patient information, offer more personalized treatment consultations, and predict patient health outcomes. AI in healthcare is one of the major trends poised to shape more secure patient portals, transforming how healthcare services and solutions are assessed and delivered.

Shift from Desktop-based to Mobile-first Design Patient Portals
Mobile-first design is a web-design approach that focuses on creating digital products for mobile devices first, before designing for other healthcare devices. The future of patient portals is majorly influenced by the adoption of mobile-first design, indicating the significant use of tablets and smartphones in daily life. This emerging trend represents a fundamental shift in how patient portals are designed, conceptualized, and experienced, primarily focusing on optimizing the user experience for mobile devices. Patient portals that were most commonly designed for desktop computers are now being designed, reimagined, and tailored for mobile platforms, acknowledging the growing preferences for accessing healthcare services and information on the go, anywhere and anytime.

The Growing Demand for Patient Engagement and Communication
The global healthcare industry is becoming more patient-centric and driving demand for more convenient and reliable sources to improve patient engagement and communication. Patient portals are becoming popular online gateway of communication between health professionals, clinical staff, and patients. For healthcare professionals, the way health practices are communicated and educates patients is a significant factor in determining healthcare success; where patient portals have become widely used by health professionals. Patient portals are becoming key tools to communicate with the patient, and it led to better patient engagement. In addition, through engagement and communication, healthcare professionals are experiencing more convenience in delivering appropriate diagnoses to the patient.

Cost Saving and Health Improvement with Patient Portals
Patient portals are positively impacting healthcare businesses in several ways, health improvement and cost management are two of the major factors widely demanded by health settings, healthcare professionals, and patients. Patient portals highly reduce the cost of hospitals as well as patients. With patient portals, hospitals can shorten the hospital stays. Patient portals shorten the hospital stay by 1.1 days which can save around $2,000 to $3,000 per day for insurance and healthcare providers. Furthermore, patient portals save maintenance costs by more than 90% on average with reduced requirements to rent and run administrative facilities and hire personnel.

INDUSTRY RESTRAINTS

General Barriers to Patient Portal Use

Patient portals have generally not been developed/created to optimize user functionality. Furthermore, some technically advanced patient portals are difficult to navigate and not user-friendly. Sometimes users of patient portals reported that they are not able to view their health information electronically and some users also experienced frustration and challenges with the portals and their usability. In addition, sometimes patients report difficulties and frustrations with the portals and their usability. New users experienced frustration with the efforts and time to set up electronic access through their providers, understand each portal user's

interface, and manage multiple passwords for different portals. Patients feel difficulties and are also often unclear about whether the information they accessed could be electronically transmitted or downloaded. The Government Accountability Office Report 2020 reported that many patients reported that the information was often not presented in helpful ways or was incorrect or even incomplete. Some patients also reported that there is no simple way to correct or flag incorrect information in the portal.

SEGMENTATION INSIGHTS

INSIGHTS BY PRODUCT

The global patient portals market by product is segmented into integrated patient portals and standalone patient portals. The integrated patient portals segment accounted for the largest market share in 2024. Integrated patient portals are the most prominent and in-demand type of healthcare portals, as they are connected to larger health systems such as hospital management systems or electronic health record (EHR) systems. These portals enable secure and efficient data exchange between various models and systems, making them a preferred choice for healthcare providers. One significant advantage of integrated solutions is their ability to eliminate connection challenges when updating either the EHR or the portal, ensuring a seamless interface. Additionally, choosing an integrated EHR portal reduces costs and minimizes productivity loss associated with training. Integration of EHR systems with patient portals also supports secure messaging, providing an efficient means of communication between patients and healthcare providers. The ability of integrated patient portals to offer a wider range of functions and services is driving their growing adoption. Globally, the increasing number of hospitals, coupled with their growing investment in IT departments, EHR systems, and hospital management systems, is creating significant opportunities for market growth.

INSIGHTS BY SOFTWARE

The global patient portals market by software is categorized into off-the-shelf and custom development. The custom development segment shows significant growth, with the fastest-growing CAGR of 13.87% during the forecast period. The development of custom software patient portals is a rapidly growing segment in the global patient portals market. Custom software offers greater flexibility and freedom compared to standard patient portals, allowing clients to design portals from the ground up with workflows and functionalities tailored to their specific domain and organizational needs. This model is highly personalized to meet customer requirements. Custom-developed patient portal software is often provided as a standalone solution. The demand for such portals is primarily driven by specialized features, including enhanced communication, personalized information-sharing capabilities, improved patient adherence, and seamless integration with other systems. These features foster stronger patient relationships and lead to better health outcomes, making them key drivers of segmental growth.

INSIGHTS BY DELIVERY MODE

The cloud & web-based delivery mode segment dominates and holds the largest share of the global patient portal market. With the rapidly growing global patient population, patient portals are increasingly recognized as effective solutions to enhance patient safety and reduce healthcare costs. Web-based technology is widely adopted in the pharmacy industry to improve not only the effectiveness and efficiency of healthcare delivery but also the quality of services by minimizing errors commonly associated with handwritten prescriptions. Web-based patient portals enable the electronic prescribing of medications through vendor-provided webpage links, a feature extensively utilized by large hospitals and other healthcare facilities. This widespread use is driving the increasing demand for such portals. Additionally, web-based delivery models require a relatively low initial investment, making them an affordable and attractive option for healthcare providers and payers. The affordability and practicality of this model continue to boost its adoption across the healthcare sector.

INSIGHTS BY END-USER

Based on the end-user, the hospital segment holds the largest global patient portal market share of over 40% in 2024. Hospitals are major market growth contributors. Hospitals are key contributors to market growth, driven by increasing awareness and the growing need to manage health information efficiently. The rising patient population and shortage of medical professionals have prompted hospitals to adopt more digitalized systems, including electronic health records (EHRs) and integrated patient portals. Hospitals most commonly utilize patient portals as integral components of their EHR systems, enabling seamless access to and management of patient information. Furthermore, in 2024, over 96% of federal acute care hospitals in the United States were utilizing EHR systems, creating significant opportunities for patient portal market expansion.

GEOGRAPHICAL ANALYSIS

North America dominates the global patient portal market with the largest share of over 34% in 2024. The North American region demonstrates promising and sustained market growth, driven by advancements in the healthcare sector, increasing awareness and acceptance of patient portals, mandatory EHR integration, and a significant patient population with rising healthcare demands. These factors collectively accelerate market growth in the region. More than 60% of the population in North America is moderately aware of patient portals, and over 50% have used at least one patient portal platform. This high level of awareness significantly contributes to the region's market growth. Additionally, over 70% of hospitals in the region utilize EHR systems, improving patient access to medical records and facilitating seamless communication and engagement between patients and healthcare professionals.

COMPETITIVE LANDSCAPE

The global patient portals market report consists of exclusive data on 40 vendors. The market is highly competitive, with several leading, growing, and emerging players operating across the global patient portal market. The market is expected to witness significant growth as new entrants collaborate with major software vendors to establish their presence. Key players such as Athenahealth, Epic Systems Corporation, eClinicalWorks, GE Healthcare, Oracle, Solutionreach, Updox, and Veradigm LLC account for the largest market shares. These companies are focused on expanding their geographical presence, enhancing their product portfolios to meet client requirements and international regulatory standards, and improving the efficiency of their offerings. These strategies collectively strengthen their market positions and drive growth in the patient portal market.

Key Vendors
-athenahealth
-Epic Systems Corporation
-eCinicalWorks
-GE Electric
-Oracle
-Solutionreach
-Updox
-Veradigm LLC

Other Prominent Vendors
-Adelante Healthcare
-Advanced Data Systems
-AdvancedMD
-AIMDek Technologies
-Harris (Bizmatics)
-Bridge Patient Portal

-CapMinds
-UNITEDHEALTH GROUP
-ClinicTracker
-CureMD Healthcare
-Elation
-Greenway Health
-Hello Health
-Qualifacts
-(InSync Healthcare Solutions)
-InteliChart
-iSalus Healthcare
-Itransition
-mdconnection
-Manage My Health
-MEDHOST
-Medical Healthcare Solutions
-Medical Information Technology
-MedicalMine
-Meditab
-Medsphere Systems Corporation
-Napier Healthcare Solutions
-NXGN Management
-Practice EHR
-Siemens Healthineers
-Tiga Healthcare Technologies
-ViSolve

SEGMENTATION & FORECAST

-By Product
oIntegrated Patient Portals
oStandalone Patient Portals
-By Software
oOff-the-shelf
oCustom Development
-By Delivery Mode
oCloud & Web-based Delivery Mode
oOn-premises Delivery Mode
-By End-Users
oHospitals
oClinics & Physician
oPayers
oOther End-user
-By Geography
-North America
oUS
oCanada

-Europe
oGermany
oFrance
oUK
oItaly
oSpain
-APAC
oJapan
oChina
oIndia
oSouth Korea
oAustralia
-Latin America
oBrazil
oMexico
oArgentina
-Middle East & Africa
oTurkey
oSaudi Arabia
oSouth Africa
oUAE

KEY QUESTIONS ANSWERED:

1.How large is the global patient portal market?
2.What are the factors driving the global patient portal market growth?
3.Which region dominates the global patient portal market share?
4.Which type of patient portals will dominate the market growth?
5.Who are the major players in the global patient portal market?

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