

Health Information Exchange (HIE) Market by Set Up Type (Public, Private), Implementation Model (Federated, Hybrid), Type (Pull, Push), Application (Web Portal, Secure Messaging), Solution (Portal, Platform Centric), End User - Global Forecast to 2025

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Abstracts

The global health information exchange market is expected to reach USD 2.0 billion by 2025 from USD 1.1 billion in 2020, at a CAGR of 12.2%. Growth in this market can be attributed to factors such as growing need to curtail healthcare costs, focus on patient-centric care delivery, growing adoption of EHRs and other HCIT solutions, government initiatives for enhancing patient care and safety, government funding for healthcare interoperability. However, data privacy concerns, need for significant investments in infrastructure development and high cost of deployment, lack of true interoperable solutions are expected to hinder the market growth.

“The private HIE segment is expected to account for the largest share during the forecast period.”

Based on the setup type, the health information exchange market is segmented into public and private HIE. The private HIE segment is expected to account for the largest share of the market in 2020. The large share and high growth can be attributed to the various advantages it offers as compared to public HIEs, such as additional functionalities and strong technical support.

“The hybrid model is expected to grow at the highest rate during the forecast period.”

Based on the implementation model, the health information exchange market is segmented into centralized/consolidated model, federated/decentralized, hybrid models.

The hybrid model segment is expected to account for the largest share of the market in 2020. This segment is also expected to grow at the highest CAGR during the forecast period. The large share and high growth can be attributed to the various advantages it offers as such as controlled flow of data and support to diverse communities, cost-effective database solution and is often the only choice for cost-constrained organizations.

“The directed exchange segment to account for the largest share during the forecast period”

Based on the type, the health information exchange market is segmented into directed(push HIE), query-based (pull-HIE), consumer-mediated exchange solutions. The directed (push HIE) exchange segment is expected to account for the largest share of the market in 2020. The large share of this segment can primarily be attributed to advantages like directed exchange prevents redundant collection of information from the patient, wasted visits, medication errors, and duplication of tests.

“The web portal development application segment to account for the largest share during the forecast period”

Based on application, the HIE market is categorized into internal interfacing, workflow management, secure messaging, web portal development, patient safety, and others (personal health records and chronic disease management). The web portal development application segment is expected to account for the largest share of the market in 2020. The large share of this segment can primarily be attributed to the increasing number of physicians opting for electronic medical records which will lead to the increased demand for web-based portals for retrieving patient information.

“The portal-centric solution segment to account for the largest share during the forecast period”

Based on the solution, the market is divided into portal-centric, messaging-centric, and platform-centric solutions. Portal-centric solution are expected to account for the largest share of the global health information exchange market in 2020. The large share of this segment can be attributed to the advantages such as access to real-time information, faster data sharing, assisting in smooth operations, and ease of evaluating risks.

“The healthcare provider segment to account for the largest share during the forecast period”

Based on end users, the market is divided into healthcare providers, healthcare payers, and pharmacies. Healthcare providers segment is expected to account for the largest share of the global health information exchange market in 2020. The large market share of this segment can be attributed to the growing focus of providers on patient satisfaction and quality of care delivered, government initiatives and incentives programs, and growing need to improve the affordability and accessibility of healthcare services.

“North America regional segment to account for the largest market share of the health information exchange market”

Geographically, the health information exchange market is segmented into North America, Europe, Asia Pacific (APAC), and the Rest of the World. North America is the largest regional market for health information exchange systems, followed by Europe. The largest share of the North American market can be attributed to the significant growth in hospital expenditure, government initiatives to improve patient care and patient safety, the high adoption of HCIT technologies, and the need to reduce healthcare costs.

Breakdown of supply-side primary interviews: • By Company Type: Tier 1 – 40%, Tier 2 – 30%, and Tier 3 – 30% • By Designation: C-level – 27%, Director-level – 18%, and Others – 55% • By Region: North America - 40%, Europe – 20%, APAC – 30%, Latin America – 8%, and Middle East – 2%

Some of the prominent players operating in the health information exchange market include Cerner Corporation (US), Allscripts Healthcare Solutions, Inc. (US), Health Catalyst (US), Intersystems Corporation (US), Epic Systems Corporation (US), MEDITECH (US).

Research Coverage

This report studies the health information exchange market based on technology, application, end users, and region. The report also studies factors (such as drivers, restraints, opportunities, and challenges) affecting market growth. It analyzes the opportunities and challenges in the market and provides details of the competitive landscape for market leaders. Furthermore, the report analyzes micro markets with respect to their individual growth trends and forecasts the revenue of the market segments with respect to four main regions and respective countries.

Key Benefits of Buying the Report

This report focuses on various levels of analysis—industry trends, market share of top players, and company profiles, which together form basic views and analyze the competitive landscape, emerging segments of the health information exchange market, and high-growth regions and their drivers, restraints, challenges, and opportunities. The report will help both established firms as well as new entrants/smaller firms to gauge the pulse of the market and garner greater market shares.

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*Business Overview, Products Offered, Recent Developments, MnM View might not be captured in case of unlisted companies.

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About

Owing to the increasing adoption rates of EHRs, the increasing number of investors, and the increasing awareness about HIE technology, the global HIE market is currently in its growing phase. The overall market was worth \$XX million in 2013 and is poised to grow at a CAGR of XX% from 2013 to 2018, to reach \$XX million by 2018. Factors such as incentives by the federal government for achieving the Meaningful Use requirements, improvements in patient care and safety, and reduction in healthcare costs are driving the growth of the global HIE market.

The global HIE market is categorized based on several parameters, namely, set-up types, vendors, implementation models, and applications. Based on set-up types, the HIE market in North America is categorized into public and private HIEs; whereas, the other parts of the world, excluding North America, only consist of private HIEs. Depending on the type of vendor, the market is classified into portal-centric vendors, messaging-centric vendors, platform-centric vendors, and others. Based on applications, the market is classified into interfacing internal applications, workflow management, secure messaging, web portal development, patient safety, and others.

According to the HITECH Act (Health Information Technology for Economic and Clinical Health), physicians, hospitals, and healthcare professionals can qualify for Medicare and Medicaid incentive payments when they achieve the "Meaningful Use" requirements, which is the use of health information exchange to enhance patient safety using certified EHR technologies.

A clinician can get incentives of \$XX from Medicare and \$XX through Medicaid. The incentive payment in the U.S. reached \$XX billion as of 2011. The HITECH Act followed by government funding is likely to boost the adoption of EHRs in the U.S. to create a nationwide HIE system, which in turn would help in improving healthcare quality and services in the U.S.

The availability of accurate health information from providers helps to enhance the quality of patient care. The adoption of EHRs for achieving HIE improves the ability to diagnose, treat, and prevent diseases and reduce medical errors that help in enhancing the quality of patient care. A patient scheduling software helps reduce patient wait times and overlapping appointments, which in turn increases patient satisfaction and helps healthcare providers build a better brand image. Furthermore, complete and up-to-

date information about patients helps physicians to eliminate the duplication of medical tests, thereby reducing medical costs.

According to the National Center for Biotechnology Information (NCBI), up to XX% of the patient safety errors and approximately XX% of adverse drug events can be eliminated if the right patient information is available at the right time. Thus, HIE systems can help in improving the quality of care by reducing medication errors and adverse drug events.

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