

Referral Management Market by Component (Software (Integrated, Standalone), Services), Delivery Mode (Cloud Based, On Premise), Type (Inbound, Outbound), End User (Providers, Payers) – Analysis & Global Forecasts to 2027

<https://marketpublishers.com/r/R44C7E9AA0EEN.html>

Date: August 2022

Pages: 190

Price: US\$ 4,950.00 (Single User License)

ID: R44C7E9AA0EEN

Abstracts

The referral management market is projected to reach USD 6.1 Billion by 2027 from USD 3.2 Billion in 2022, at a CAGR of 13.6%. Various government initiatives focusing on healthcare digitization and increasing adoption of healthcare IT solutions across the healthcare facilities are set to drive the referral management market.

However, a lack of standard healthcare protocols, high installation cost of systems, poorly connected IT infrastructure, lower IT implementation budgets of hospitals, the reluctance of healthcare practitioners towards the adoption of IT-based solutions, and a shortage of in-house IT expertise in hospitals are expected to restrain the growth of this market to a certain extent during the forecast period.

“The software component accounted for the largest market share during the forecast period.”

On the basis of component, the referral management market is bifurcated into software and services. The software segment is accounted for the largest market share during the forecast period. Introduction of advanced integrated and standalone software solutions along with periodic software upgrades is expected to raise the growth of this market segment.

“The cloud-based mode of delivery segment accounted for the largest share of the referral management market in 2021.”

On the basis of mode of delivery, the referral management market is bifurcated into cloud-based and on-premise. The cloud-based segment accounted for the largest share of the global market in 2021. The large share and high growth of this segment can be attributed reduction in the cost of deploying referral management solutions and improved capacity flexibility.

“High volumes of inbound referrals to hold highest market share during the forecast period.”

On the basis of type, the referral management market is divided into inbound and outbound referrals. The inbound referrals segment is projected to hold the highest market share during the forecast period. The increasing adoption of referral management solutions in hospitals and specialist centers are the key growth factor contributing to the large share of this segment.

“The providers segment in the end users is expected to hold the largest share of the global referral management market in 2022”

On the basis of end user, the referral management market is bifurcated into providers, payers and others. In 2021, the providers segment accounted for the largest market share and expected to grow at the highest rate during the forecast period. Increased adoption of referral management solutions by the primary care physicians, specialists and other healthcare providers to streamline patient referral process and reduce network leakages are some of the factors supporting the market growth of this segment.

“The Asia Pacific referral management market is expected to grow at the fastest rate during the 2022 to 2027.”

Geographically, the referral management market is bifurcated into North America, Europe, Asia Pacific (APAC), and the Rest of the World. The Asia Pacific market is expected to grow at the fastest rate during the 2022 to 2027. The high growth in Asia Pacific region can be attributed to the technology revolution in healthcare sector and growing emphasis of government on connected healthcare approach in this region. Rising geriatric patient pool in the APAC countries, increasing demand for advanced healthcare services and efficient care transition will further support the regional market growth.

Breakdown of supply-side primary interviews:

By Company Type: Tier 1 – 60%, Tier 2 – 18%, and Tier 3 – 22%

By Designation: C-level – 35%, Director-level – 25%, and Others – 40%

By Region: North America - 20%, Europe – 25%, APAC – 40%, and RoW – 15%

Prominent players in this market are Cerner Corporation (US), CarePort Health (US), eHealth Technologies, Inc. (US), Optum, Inc. (US), Change Healthcare (US), ReferralMD (US), Kyruus (US), Eceptionist (US), Persistent Systems (India), HealthViewX (US), Conifer Health Solutions, LLC (US), EcoSoft Health (US), DentalCareLinks (US), BlockitNow, Inc. (US), Cloudmed (US), EZ Referral (Canada), ReferWell (US), Arcadia (US), HealthWare Systems (US), Netsmart Technologies, Inc. (US), Advanced (UK), Innovaccer, Inc. (US), Lightbeam Health Solutions (US), MDfit (US), and Medcohere Inc. (US). These players are increasingly focusing on product launches, expansions, acquisitions, and partnerships to expand their product offerings in the referral management market.

Research Coverage

The report studies the referral management market based on component, mode of delivery, type, end user, and region

The report analyzes factors (such as drivers, restraints, opportunities, and challenges) affecting the market growth

The report evaluates the opportunities and challenges in the market for stakeholders and provides details of the competitive landscape for market leaders

The report studies micro-markets with respect to their growth trends, prospects, and contributions to the total referral management market

The report forecasts the revenue of market segments with respect to four major regions

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 referral management 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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*Details on Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.

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