

# **Patient Portal Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Standalone, Integrated), By Delivery Mode (Web-based, Cloud-based), By End-use (Providers, Payers, Others), By Region, By Competition Forecast & Opportunities, 2018-2028F**

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## **Abstracts**

The Global Patient Portal Market has reached a value of USD 3.04 billion in 2022 and is poised for substantial growth, with an expected Compound Annual Growth Rate (CAGR) of 15.29% through 2028. This growth is attributed to various factors, including the widespread adoption of electronic health records (EHRs), increasing initiatives to engage patients, and a transition towards value-based healthcare. A patient portal is a secure online platform that empowers patients to access their medical records, communicate with healthcare providers, schedule appointments, and manage their healthcare information electronically.

### **Key Market Drivers**

#### **Rising Patient-Centric Care**

In the evolving landscape of healthcare, the concept of patient-centric care has emerged as a driving force that not only transforms patient experiences but also fuels the growth of the global patient portal market. Patient-centric care places the patient at the heart of healthcare decisions, giving them an active role in managing their health. This shift in focus has ushered in an era of unprecedented opportunities for patient portal solutions. Patient-centric care empowers individuals by providing them with easy access to their medical records and healthcare information. Patient portals serve as the

gateway to this wealth of information. Patients can log in at any time to view test results, review their medical history, and gain insights into their health conditions. This access to information fosters transparency and enables patients to make informed decisions about their healthcare. Patient engagement is a pivotal element of patient-centric care. Engaged patients are more likely to adhere to treatment plans, communicate with their healthcare providers, and actively participate in their care. Patient portals facilitate this engagement by offering features such as secure messaging, appointment scheduling, and medication management. As patients become more engaged in their healthcare journey, the demand for patient portal solutions surges. The rise of patient-centric care has coincided with the expansion of telehealth and remote monitoring. Patient portals play a crucial role in supporting these initiatives. Through patient portals, healthcare providers can remotely monitor patients' vital signs, track chronic conditions, and conduct virtual consultations. This level of convenience aligns with the patient-centric approach, as it allows patients to receive care from the comfort of their homes. Patient-centric care emphasizes the need for seamless care coordination among various healthcare providers. Patient portals facilitate communication and data sharing between primary care physicians, specialists, and other healthcare professionals. This improves care coordination, reduces errors, and ensures that patients receive holistic care. As healthcare systems increasingly prioritize coordination, patient portal adoption becomes imperative. Governments and regulatory bodies worldwide are endorsing patient-centric care as part of broader healthcare reform efforts. Regulations such as the Health Information Portability and Accountability Act (HIPAA) in the United States require healthcare providers to offer patients secure access to their health information. Patient portals are essential tools for achieving compliance with these regulations, and organizations are investing in them to avoid penalties and ensure data security.

## Government Mandates and Incentives

The global patient portal market is on an upward trajectory, and one of the critical drivers behind this growth is the active involvement of governments through mandates and incentives. These initiatives are not only reshaping the healthcare landscape but also propelling the adoption of patient portals worldwide. The United States has been a trailblazer in promoting the adoption of electronic health records (EHRs) and patient portals through the Meaningful Use program. This federal initiative, now known as the Promoting Interoperability program, incentivizes healthcare providers to demonstrate meaningful use of EHRs, which includes the incorporation of patient portals. To qualify for financial incentives, healthcare organizations must meet specific criteria, including offering patients access to their health records through secure online portals. This

mandate has been a significant driver for the proliferation of patient portals in the U.S. Government mandates often emphasize the importance of data accessibility and transparency in healthcare. Patient portals are instrumental in achieving these goals. By granting patients access to their health information, governments aim to enhance transparency and ensure that patients can actively participate in their care decisions. Patient portals enable patients to review their medical records, track test results, and understand their health conditions better, promoting transparency in healthcare delivery. Government initiatives recognize the value of empowering patients with their health data. In many countries, including the United States, patient portals are mandated to offer a secure and user-friendly platform for patients to access their medical records, communicate with healthcare providers, and engage in their healthcare journey actively. This empowerment leads to more informed decision-making and increased patient involvement in their care. Government mandates often come with stringent data security and privacy requirements. Patient portals are mandated to adhere to these regulations, such as the Health Insurance Portability and Accountability Act (HIPAA) in the U.S. This ensures that patients' sensitive health information is safeguarded against breaches and unauthorized access, instilling trust among patients and healthcare providers. Many governments are keen on reducing healthcare costs, and patient portals can contribute to this objective. By facilitating online appointment scheduling, prescription refills, and secure messaging, patient portals streamline administrative tasks and reduce the burden on healthcare staff. This efficiency leads to cost savings and improved resource allocation.

### Improved Healthcare Access and Convenience

In today's fast-paced world, convenience and accessibility have become paramount in nearly every aspect of our lives. The healthcare industry is no exception, with patient-centric care models emphasizing the need for improved access and convenience. Patient portals, secure online platforms that allow individuals to access their health information and interact with healthcare providers, are at the forefront of this transformation. The rise of patient portals ensures that patients have constant access to their health information. This 24/7 availability is a game-changer for individuals who may have questions or concerns about their health outside of regular office hours. Patients can log in at their convenience to view lab results, medication lists, and even their medical history, reducing the need for phone calls or office visits for routine inquiries. Patient portals have the remarkable ability to transcend geographical boundaries. Patients living in remote or underserved areas can benefit immensely from patient portals. They can connect with their healthcare providers, schedule appointments, and access their health records without the need to travel long distances, thus improving

access to healthcare services for populations that were previously underserved. Patient portals simplify the process of scheduling appointments and requesting prescription refills. This convenience aligns with the busy lives of modern patients. Whether it's booking a follow-up appointment or renewing a prescription, patients can complete these tasks with just a few clicks, eliminating the need for lengthy phone calls or in-person visits. The recent surge in telehealth services has highlighted the importance of convenient access to care. Patient portals seamlessly integrate with telehealth platforms, enabling patients to schedule virtual appointments, access telemedicine consultations, and receive remote monitoring services. This convenience has been instrumental in expanding access to healthcare, especially during the COVID-19 pandemic. Patient portals often offer tools and resources for patients to actively manage their health. These may include health trackers, educational materials, and personalized care plans. Patients can use these resources to monitor their conditions, set health goals, and track their progress, leading to improved self-management and overall health outcomes.

### Enhanced Care Coordination

In the ever-evolving landscape of healthcare, care coordination has become a central focus. Enhanced care coordination not only improves patient outcomes but also fuels the growth of the global patient portal market. Patient portals, secure online platforms that enable patients to access their health records and communicate with healthcare providers, play a pivotal role in this transformation. One of the primary challenges in healthcare is ensuring that all members of a patient's care team have access to up-to-date and comprehensive information. Patient portals facilitate the seamless sharing of patient data among primary care physicians, specialists, nurses, pharmacists, and other healthcare providers. This real-time information exchange fosters better collaboration, reduces errors, and ultimately enhances patient care. Patient portals provide a secure channel for communication between patients and their healthcare providers. Patients can send messages, ask questions, and request information, all from the convenience of their homes. Enhanced communication ensures that patients can reach out to their healthcare team when needed, promoting timely interventions and reducing the risk of misunderstandings. Patient portals often integrate with electronic health records (EHRs), allowing healthcare providers to access a patient's complete medical history, including test results, medications, allergies, and past treatments. This comprehensive view of a patient's health empowers providers to make more informed decisions and deliver personalized care. Medication errors and non-adherence are significant challenges in healthcare. Patient portals assist in medication management by providing patients with easy access to their medication lists and prescription details. Patients can

request refills, report side effects, and receive medication reminders through the portal, leading to safer and more effective medication management. Care coordination often involves referrals to specialists or consultations with other healthcare professionals. Patient portals simplify this process by enabling secure sharing of medical records and test results with specialists. This reduces delays in care, expedites consultations, and ensures that all providers are on the same page regarding the patient's condition.

## Key Market Challenges

### Interoperability Issues

One of the most significant challenges facing patient portals is interoperability. Healthcare systems often use different electronic health record (EHR) systems and patient portal solutions that do not seamlessly communicate with each other. This results in fragmented patient data, making it difficult for healthcare providers to access a complete and accurate view of a patient's medical history. Achieving interoperability between disparate systems remains a top priority for the industry.

### Data Security and Privacy Concerns

Patient health data is highly sensitive and subject to strict regulations, such as the Health Insurance Portability and Accountability Act (HIPAA) in the United States. Ensuring the security and privacy of patient information is a significant challenge for patient portals. Data breaches can have severe consequences, eroding patient trust and exposing healthcare providers to legal liabilities. Patient portals must continually invest in robust security measures to protect against cyber threats.

### Limited Patient Adoption

Despite the benefits they offer, patient portals often face low adoption rates among patients. Several factors contribute to this challenge, including limited digital literacy among certain patient populations, concerns about data privacy, and the perception that patient portals may be difficult to use. Encouraging patients to actively engage with these platforms remains a hurdle that healthcare providers must overcome.

### Uneven Implementation Across Healthcare Providers

The adoption of patient portals is uneven across healthcare providers. While some organizations have fully integrated patient portals into their healthcare delivery systems,

others lag behind. This fragmentation can result in disparities in patient access to online health records and communication with providers, creating a less uniform patient experience.

## Key Market Trends

### Integration with Wearables and IoT Devices

As wearable devices and the Internet of Things (IoT) become increasingly integrated into healthcare, patient portals will follow suit. Patients will be able to connect their wearables, such as fitness trackers or smartwatches, to their patient portals. This integration will allow for the automatic transfer of health data, enabling patients and healthcare providers to monitor health metrics more effectively.

### AI-Powered Personalization

Artificial intelligence (AI) and machine learning are set to revolutionize patient portals. These technologies will analyze patient data to provide personalized health recommendations, reminders, and alerts. AI-powered chatbots will offer real-time assistance, answering patient questions and guiding them through their healthcare journeys.

### Telehealth Integration

Telehealth has seen exponential growth, especially in response to the COVID-19 pandemic. Patient portals will increasingly integrate telehealth capabilities, allowing patients to schedule and conduct virtual appointments seamlessly. This trend will expand access to care, particularly in remote or underserved areas.

### Data Interoperability

Addressing the challenge of data interoperability will continue to be a key trend. Patient portals will work towards achieving greater compatibility with various electronic health record (EHR) systems, ensuring that patients and healthcare providers can access comprehensive and up-to-date health information.

### Segmental Insights

### Type Insights



Based on the category of Type, the Integrated segment emerged as the dominant player in the global market for patient portal in 2022. This can be attributed to its capability to offer comprehensive solutions that enhance efficiency, provide various functionalities, and offer cost-effective solutions. Integrated portals eliminate the necessity for creating a distinct customized system to bridge the gap between physician needs and patient data. Furthermore, ongoing research endeavors focused on developing pre-integrated Electronic Health Record (EHR) peripherals are anticipated to drive this growth. EMR/EHR systems with integrated patient portals serve as a component within any other healthcare IT system or pre-existing EMR/EHR.

Furthermore, these systems offer users a unified interface to perform numerous business tasks. They are more cost-effective, widely adopted, and in high demand since they provide an all-in-one solution. In July 2021, a strategic partnership between Allscripts, a prominent EHR provider, and Medfusion was announced. This collaboration aimed to offer Allscripts EHR and Practice Management client's access to the top-rated Medfusion patient portal. This new online patient portal from Allscripts is expected to help physician practices save time, reduce costs, and enhance revenue by incorporating features that are highly favored by patients.

On the other hand, Standalone patient portals are predicted to experience substantial growth throughout the forecast period spanning from 2022 to 2030. This type of portal is well-suited for smaller healthcare entities like independent pharmacies, local medical offices, boutique healthcare providers, and private labs. Standalone patient portals operate on a simpler software architecture, requiring fewer resources and efforts for development. They can be constructed more swiftly by a team of less-experienced programmers, making them generally affordable for smaller businesses.

### Delivery Mode Insights

In 2022, the web-based category claimed the largest market share. The surge in this segment's popularity can be attributed to the advantages it offers, including quicker implementation, no need for additional hardware investment, automatic software updates, and low initial cost.

Unlike on-premises software, web-based software can be set up off-site and overseen by a third party. Providers of web-based software typically charge an annual or monthly fee based on usage. Key benefits associated with web-based software encompass cost-effectiveness (as it eliminates the need to purchase software or hardware systems),

swift return on investment, and straightforward deployment.

Meanwhile, the cloud-based category is expected to witness substantial growth in the projected period. This is because it allows healthcare organizations to share and integrate data from various locations or systems in real-time and establish a comprehensive database registry. Cloud-based portals offer various features, including email marketing, online appointment scheduling, health education tools, and integration with social media platforms.

## Regional Insights

In 2022, North America took the lead in the market, primarily due to the technological advancements within the field of healthcare IT. The United States and Canada, in particular, have demonstrated considerable success in integrating IT technologies into their healthcare systems, a factor that is expected to fuel market expansion.

The United States alone bears the burden of over 130 million individuals grappling with at least one chronic health condition. These conditions are responsible for approximately 70% of annual deaths in the country. Given the substantial target population in the region, the management of multiple health issues has become increasingly complex. Moreover, the shift from a reimbursement model based on the quantity of services provided to one based on the quality of care delivered is amplifying the demand for patient portal systems in North America.

Europe is projected to secure the second-largest market share, primarily driven by the growing adoption of healthcare IT and telehealth initiatives, as well as the digitalization of healthcare processes across the region. Meanwhile, the increasing acceptance and demand for advanced medical infrastructure in Asia-Pacific will be the key factor propelling market growth in that area. The Asia-Pacific region is anticipated to experience significant growth in the foreseeable future, with China, Japan, and India emerging as the most rapidly advancing nations in the region, thereby contributing to the expansion of the market for high acuity information systems.

## Key Market Players

Allscripts Healthcare LLC

athenahealth Inc



Cerner Corp

Epic Systems Corp

GE Healthcare Inc

Greenway Health LLC

McKesson Corp

MedFusion Inc

NextGen Healthcare Information Systems LLC

Report Scope:

In this report, the Global Patient Portal Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Patient Portal Market, By Type:

Standalone

Integrated

Patient Portal Market, By Delivery Mode:

Web-based

Cloud-based

Patient Portal Market, By End-use:

Providers

Payers

Others

Patient Portal Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Patient Portal Market.

## Available Customizations:

Global Patient Portal market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).

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