

North America Electronic Health Record Market Size and Forecast (2021 - 2031)

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Abstracts

The North America Electronic Health Record (EHR) Market is projected to grow significantly, reaching an estimated US\$ 44,202.6 million by 2031, up from US\$ 22,248.5 million in 2024. This growth reflects a compound annual growth rate (CAGR) of 10.5% from 2025 to 2031.

Executive Summary and Market Analysis

North America stands as the frontrunner in the global electronic health record market, propelled by robust policy support, a well-established healthcare infrastructure, and a high rate of digital adoption among medical practices. The United States has made remarkable strides in EHR adoption over the last decade. According to the Office of the National Coordinator for Health IT, as of 2021, approximately 78% of office-based physicians and nearly 96% of non-federal acute care hospitals had implemented a certified EHR system. This marks a significant increase from 2011, when adoption rates were only 34% for physicians and 28% for hospitals.

The surge in EHR adoption can be attributed to federal initiatives that promote the use of certified EHRs, alongside ongoing policy efforts aimed at enhancing interoperability, facilitating patient data sharing, and fostering digital health innovations. Legislative measures such as the 21st Century Cures Act focus on enabling secure and efficient health data exchange among various systems and providers.

In Canada, the digital health landscape is also evolving positively. In June 2024, Health Minister Mark Holland introduced Bill C-72, known as the Connected Care for Canadians Act. This legislation aims to provide Canadians with secure access to their health data and facilitate the sharing of patient information among healthcare providers,

reflecting a broader vision to modernize the healthcare system and promote patient-centered care.

As investments in cloud-based EHR platforms increase, along with the rising demand for virtual care and heightened patient expectations for access and transparency, North America is poised to maintain its leadership in the global EHR market. The region's clear regulatory framework and commitment to innovation provide a solid foundation for ongoing digital transformation in healthcare.

Market Segmentation Analysis

The North America Electronic Health Record Market can be segmented based on various criteria:

By Installation Type: The market is divided into Cloud-Based and On-Premise systems, with the Cloud-Based segment leading in 2024.

By Type: The market is categorized into Acute EHR, Ambulatory EHR, and Post-Acute EHR, where the Acute EHR segment was the dominant player in 2024.

By Application: The segments include Clinical Records, Administrative Tasks and Billing, Physician Support, and Patient Portals, with Clinical Records taking the lead in 2024.

By Distribution Channel: This includes Hospitals and Clinics, Ambulatory Care Centers, and Physicians' Offices or Specialty Care Centers, with Hospitals and Clinics being the largest segment in 2024.

Market Outlook

As healthcare increasingly relies on data, the role of EHRs in analytics is expected to expand significantly. Technologies such as artificial intelligence (AI), particularly machine learning (ML) and natural language processing (NLP), are set to play a pivotal role in the evolution of EHR systems. These technologies can alleviate the burden of manual data entry and documentation, allowing healthcare providers to concentrate more on clinical decision-making and patient care. By automating repetitive tasks like transcribing, coding, and organizing unstructured data, AI enhances both efficiency and accuracy in healthcare workflows.

However, while AI can streamline processes, it cannot entirely replace human oversight. Human involvement remains crucial to ensure the accuracy, reliability, and context of the information captured. Trained professionals are essential for validating data, correcting discrepancies, and maintaining quality throughout the patient's record, especially in complex clinical scenarios.

The future of EHRs will also be significantly influenced by regulatory developments, which will guide innovation to ensure compliance, privacy, and data integrity. Current and forthcoming regulations will shape how EHR platforms evolve to meet the needs of providers, payers, and patients alike.

Another vital trend is the push for interoperability and seamless data integration. Breaking down information silos will facilitate the creation of comprehensive, longitudinal patient profiles, emphasizing wellness, preventive care, and continuity across various care settings. This transformation supports a more holistic and patient-centered approach to healthcare.

As the volume and complexity of healthcare data continue to rise, fully integrated, AI-enabled EHR systems will become essential for effectively managing, analyzing, and applying health information, ultimately driving better outcomes and more personalized, proactive care delivery.

Country Insights

The North America Electronic Health Record Market is segmented by country into the United States, Canada, and Mexico, with the United States holding the largest market share in 2024. The US leads the global EHR market due to strong government support and an advanced healthcare infrastructure. The Health Information Technology for Economic and Clinical Health (HITECH) Act has significantly boosted EHR adoption across hospitals and clinics. Healthcare providers are increasingly moving from paper-based systems to digital records to enhance patient outcomes and reduce costs. Major players such as Epic Systems, Cerner Corporation, and Allscripts are based in the US, driving technological innovation and competition. The growing emphasis on interoperability and value-based care is prompting hospitals to invest in integrated EHR systems. The US Department of Veterans Affairs has also expanded its EHR modernization project to improve data sharing capabilities.

Company Profiles

Key players in the North America Electronic Health Record Market include Oracle Corp, eClinicalWorks LLC, McKesson Corp, NEXTGEN HEALTHCARE INFORMATION SYSTEM, LLC, Athenahealth Inc, Greenway Health LLC, CureMD.com Inc, AdvancedMD Inc, Veradigm Inc, and ChipSoft BV. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to deliver innovative solutions and enhance their market presence.

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