Healthcare IT Market by Product & by End User - Global Forecast to 2020

Description:
"Healthcare IT Market by Product (EHR, RIS, PACS, VNA, CPOE, mHealth, Telehealth, Healthcare analytics, Supply Chain Management, Revenue Cycle Management, CRM, Claims Management, Fraud Management) by End User (Provider, Payer) - Global Forecast to 2020"

The market growth in healthcare IT can be attributed to the growing need to adhere to regulatory guidelines, government initiatives for eHealth, high return on investment (ROI), and rising needs to curtail escalating healthcare costs. On the other hand, lack of in-house IT domain knowledge and reluctance among end users to adopt new methods are expected to restrain the overall market growth to a certain extent during the forecast period.

The healthcare IT market, by product, is segmented into healthcare provider solutions, healthcare payer solutions, and HCIT outsourcing services. The healthcare provider solutions segment is expected to grow at the highest CAGR of 16.4% during the forecast period. This segment is further categorized into clinical solutions and non-clinical solutions. Non-clinical solutions accounted for the largest share of the global healthcare IT market in 2014. However, the clinical solutions segment is poised to grow at the highest CAGR of 19.8% in the forecast period. Growth in this segment can be attributed be the increasing demand for improved patient safety and patient care, stringent regulations regarding healthcare provider solutions, and need for integrated healthcare systems.

The HCIT outsourcing services market is segmented into provider HCIT outsourcing services, payer HCIT outsourcing services, operational HCIT outsourcing services, and IT infrastructure management services. The IT infrastructure management services segment accounted for the largest share of 48% of the global healthcare IT market in 2014. This segment is projected to reach USD 23,489.0 million by 2020, growing at a CAGR of 7.6% during the forecast period. The overall growth of the HCIT outsourcing services market is driven by the growing focus of healthcare providers and payers on minimizing operational costs of healthcare delivery and maximizing profit margins. Lack of skilled IT professionals in healthcare organizations is one of the key factors that compels healthcare providers to outsource some administrative operations to specialized vendors. This helps healthcare providers to ensure effective utilization of various IT solutions for several business processes at an affordable cost.

North America is the largest regional segment of the global healthcare IT market; it accounted for the largest share of 45.5% of the healthcare IT market in 2014, followed by Europe, Asia-Pacific, Latin America, and the Middle East & Africa. The large share of this region can be attributed to the stringent legislative and accreditation requirements regarding healthcare, high adoption rate of HCIT technologies (for reducing the soaring healthcare costs), regulatory requirements regarding patient safety, and the presence of a large number of IT companies, such as GE Healthcare (U.K.), EPIC Systems (U.S.), Cerner Corporation (U.S.), McKesson Corporation (U.S.), Infor, Inc. (U.S.), Philips N.V. (Netherlands), Allscripts Healthcare Solutions, Inc. (U.S.), Sap AG (Germany), and Oracle Corporation (U.S.) in this region. Although North America and Europe will continue to dominate the market during the forecast period, a majority of growth in the global healthcare IT market will be driven by the rising demand for various imaging modalities in APAC and Latin America. China, India, and Brazil are expected to offer significant growth opportunities for market players in the forecast period, as the governments in these countries are increasingly focusing on enabling efficient, affordable, and on-time delivery of quality care through the implementation of healthcare IT solutions.

The major players in the healthcare IT market are McKesson Corporation (U.S.), Allscripts Healthcare Solutions, Inc. (U.S.), athenahealth, Inc. (U.S.), Epic Systems Corporation (U.S.), GE Healthcare (U.K.), Siemens Healthcare (Germany), Cerner Corporation (U.S.), and Carestream Health (U.S.).

Scope of the Report

This research report categorizes the global healthcare IT market by product and end user. These markets are broken down into segments and sub segments, providing value analysis for 2013, 2014, and 2015, as well as forecast up to 2020. Each market is comprehensively analyzed by geography (North America, Europe, Asia-Pacific, Latin America, and the Middle East & Africa) to provide in-depth information on the global scenario.
Global Healthcare IT Market, by Product:

- Healthcare Provider Solutions
  - Clinical Solutions
  - Electronic Health/Medical Records
  - PACS and VNA
  - Computerized Physician Order Entry
  - Clinical Decision Support Systems
  - Radiology Information Systems
  - Specialty Management Information Systems
  - Healthcare IT Integration Systems
  - Practice Management Systems
  - Laboratory Information Systems
  - Digital Pathology
  - mHealth Solutions and Apps
    - Connected Medical Devices
    - Healthcare Apps (mHealth Apps)
- Telehealth Solutions
- Medical Image Analysis
- Non-clinical Solutions
- Pharmacy Information Systems
- Medication Management Systems
- Electronic Medication Administration Records
- Barcode Medication Administration
- Medication Inventory Management Systems
- Medication Assurance Systems
- Healthcare Asset Management
- Equipment Management Systems
- Patient Tracking and Management
- Temperature and Humidity Monitoring
- Workforce Management Systems
- Revenue Cycle Management
- Admission Discharge Transfer/Registration
- Computer Assisted Coding Systems
- Patient Scheduling
- Patient Billing and Claims Management Solutions
- Electronic Data Interchange
- Financial Management Systems
- Medical Document Management Systems
- Integrated Document Management Software
- Others
- Healthcare Information Exchanges
- Population Health Management
- Supply Chain Management
- Procurement management
- Inventory Management
- Healthcare Analytics
- Clinical Analytics
- Financial Analytics
- Operational and Administrative Analytics
- Customer Relationship Management
- Healthcare Payer Solutions
- Pharmacy Analysis and Audit
- Claims Management
- Fraud Management
- Computer-assisted Coding Systems
- Payment Management
- Patient Billing Management
- Provider Billing Management
- Provider Network Management
- Member Eligibility Management
- Customer Relationship Management
- Medical Document Management
- Other (General Ledger & Payroll Management)
- HCIT Outsourcing Services
  - Provider HCIT Outsourcing Services
    - Medical Document Management Services
    - Pharmacy Information Management Services
    - Laboratory Information Management Services
    - Revenue Cycle Management Services
  - Others
- Payer HCIT Outsourcing Services
  - Claim Management
  - Customer Relationship Management Services
  - Billing System
  - Fraud Detection
  - Others
- Operational HCIT Outsourcing Services
  - Supply Chain Management Services
  - Business Process Management Services
  - Others
- IT Infrastructure Management Services

Global Healthcare IT Market, by End User:
- Healthcare Providers
  - Hospitals
  - Ambulatory Care Centers
  - Diagnostic & Imaging Centers
  - Home Healthcare Agencies, Nursing Homes, and Assisted Living Centers
  - Pharmacies
  - Healthcare Payers
  - Private Payers
  - Public Payers

Global Healthcare IT Market, by Region:
- North America
  - U.S.
  - Canada
- Europe
  - Germany
  - U.K.
  - France
  - Italy
  - Spain
  - Rest of Europe (ROE)
- Asia-Pacific (APAC)
  - Japan
  - China
  - India
  - Rest of Asia-Pacific (ROAPAC)
- Latin America
  - Brazil
  - Mexico
  - Rest of Latin America
  - Middle East and Africa

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