

Report Information

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Healthcare BPO Market Research Report - Forecast till 2030

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Description:

Global Healthcare BPO Market Overview

The Healthcare BPO Market Size was valued at USD 224.5 billion in 2021 and is projected to grow from USD 247.39 Billion in 2022 to USD 488.28 billion by 2030, exhibiting a compound annual growth rate (CAGR) of 10.2% during the forecast period (2024 - 2030). The growing demands for cost-effective healthcare services, the rapidly increasing adoption of digital technologies in the healthcare sector, and the growing need for customized solutions in the healthcare sector are the key market drivers boosting the healthcare BPO market growth.

Healthcare BPO Market

Source: Secondary Research, Primary Research, MRFR Database, and Analyst Review

The primary market factors propelling the growth of the healthcare BPO market are the rising needs for affordable healthcare services, the quickly expanding usage of digital technology in the healthcare sector, and the rising demand for specialized healthcare solutions. Additionally, the adoption of cloud-based BPO solutions in hospitals and clinics to deploy global service delivery models affordably will fuel the growth of the healthcare BPO market.

The expanding industry is also aided by consumers' increasing knowledge of the availability of various health insurance plans and telemonitoring services. The market CAGR for healthcare BPO is expected to increase in the coming years as a result of several encouraging initiatives taken by the governments of various countries to adopt BPO strategies for verifying insurance plans, filling out claims, checking for drafting errors, and ensuring data security due to the rise in data breaches.

As healthcare becomes a larger portion of the general economy, structural changes, such as a drive toward paying for value, a higher reliance on care management, and increased cost-sharing with customers, are becoming more prominent, slowing the growth in healthcare spending. Despite the fact that medical costs have been steady over the past five years, oscillating between 6% and 7%, it is anticipated that healthcare costs will rise. In light of this, it is predicted that rising healthcare expenses would encourage offshore outsourcing and, in the end, the BPO sector in the healthcare industry.

This growth is the result of more patients using electronic health services, such as electronic health records. More hospital admissions and more claims are caused by the rising frequency of chronic illnesses including cardiovascular diseases (CVDs), which is driving the growth of the industry.

March 2023: Florida-based healthcare technology company Availity's patient access outsourcing business unit will be acquired by AGS Health, a leading provider of tech-enabled revenue cycle management (RCM) solutions and a strategic growth partner to healthcare providers across the U.S. Achieving complete and correct reimbursement for services has never been more important because more than half of U.S. hospitals expect a year of negative margins. With this growth, AGS Health will be better able to support customers' first-pass reimbursement rates by offering quicker, more adaptable financial clearance solutions at a larger scale.

Healthcare BPO Market Trends

- **Increasing pressure to reduce rising healthcare costs to boost the market growth**

Outsourcing is important for reducing costs as it enables companies to spend less on labor, space, and resource management. Health insurance exchanges, which are online marketplaces where consumers can compare and buy health insurance from competing providers, are growing in number united states, putting pressure on healthcare payer margins. The availability of coverage from

numerous private healthcare competitors to consumers is expected to increase the use of outsourcing to reduce costs.

Structural changes, such as a push toward paying for value, a stronger reliance on care management, and increased cost-sharing with customers, are becoming more pronounced as healthcare becomes a larger part of the overall economy, decelerating the expansion in healthcare spending. The cost of healthcare is expected to increase, despite medical prices have remained stable over the previous five years, fluctuating between 6% and 7%. As a result, it is anticipated that increasing healthcare costs will fuel offshore outsourcing and, ultimately, the BPO sector in healthcare.

The growing consumer awareness of the availability of various health insurance policies and telemonitoring services further contributes to the market's expansion. In addition, several encouraging initiatives taken by the governments of various countries to adopt BPO strategies for verifying insurance plans, filling out claims, checking for drafting errors, and ensuring data security due to the rise in data breaches are boosting the market CAGR of healthcare BPO in the upcoming years.

Furthermore, adopting cloud-based BPO solutions in hospitals and clinics to implement international service delivery models at reasonable costs will drive the healthcare BPO market revenue growth.

Healthcare BPO Market Segment Insights

Healthcare BPO Payer Service Insights

The market segments of healthcare BPO, based on payer service, includes claims management, integrated front-end services & back-office operations, member management, billing & accounts management, analytics & fraud management, and HR. The claims management segment held the majority share in 2021, contributing to around ~45-58% of the healthcare BPO market revenue. The increase in patients using electronic health services, such as electronic health records, is responsible for this growth. The increasing prevalence of chronic diseases such as cardiovascular diseases (CVDs) results in more hospital admissions and a higher number of claims, fueling the growth of the claims management segment. It primarily focuses on healthcare organizations (clinics), drugstores, hospitals, etc., that offer services covered by private insurance plans and are eligible for reimbursement.

Healthcare BPO Provider Service Insights

The healthcare BPO market segmentation, based on provider service, includes revenue cycle management, patient care, and patient enrollment. Revenue cycle management dominated the market in 2021 and is anticipated to be the fastest-growing segment in the forecast period, 2022-2030, due to an increase in government initiatives aimed at increasing the acceptance of RCM (revenue cycle management) solutions, increasing revenue loss due to billing errors, and increase acceptance of electronic health records. Most hospitals currently rely on third-party providers for denial management services owing to the need for more specialized skills and time to manage the reimbursement process. Incorrect insurance verification and incomplete claim submission are examples of common medical billing mistakes. Specialty revenue cycle management services providers can help hospitals avoid revenue loss due to billing errors, contributing to the expansion of the revenue cycle management segment.

Figure 2: Healthcare BPO Market, by Provider Service, 2021 & 2030 (USD Million)

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|---|
| Healthcare BPO Market, by Provider Service, 2021 & 2030 (USD Million) |
|---|

Source: Secondary Research, Primary Research, MRFR Database, and Analyst Review

Moreover, the patient care segment is expected to grow at the fastest CAGR throughout the forecast period due to increased chronic ailments cases such as cardiovascular diseases (CVDs), which necessitate enhanced patient care.

March 2022: CPSI acquired HRG, a high-quality healthcare provider. Healthcare facilities can depend on HRG as the market leader for specialized claims processing systems and consulting services that increase productivity, revenue growth, and patient satisfaction.

July 2023: Coronis Health—a reputable name in revenue cycle management for healthcare facilities—announced the expansion of its service offering to encompass complete business process outsourcing (BPO) solutions. After Coronis Health and MiraMed Global Services successfully merged, this strategic step was made, with BPO being one of the legacy services MiraMed brought forward. In addition to coding (inpatient, outpatient, and professional), coding review and audit services, registration and insurance verification, prior authorization support, AR billing and follow-up, denial management, and appeal preparation, backlog clean-up projects and AR wind-downs, and credit balance processing, Coronis Health offers end-to-end and à la carte BPO solutions.

Healthcare BPO Regional Insights

By Region, the study provides market insights into North America, Europe, Asia-Pacific, and the Rest of the World. The North American Healthcare BPO market, accounted for USD 96.98 billion in 2021 and is expected to exhibit a significant CAGR growth over the study period. The existence of a well-

established healthcare system, rising demand for outsourcing to cut costs, and timely and efficient results all contributed to regional market growth. Factors such as increasing pressure to reduce costs and improve services and changing government regulations propel the North American market of healthcare BPO forward.

In addition, the United States, Canada, Germany, France, the United Kingdom, Italy, Spain, Australia, South Korea, Japan, and Brazil are among the major nations covered in the market report.

Figure 3: Healthcare BPO Market Share By Region 2021 (%)

HEALTHCARE BPO MARKET SHARE BY REGION 2021 (%)`

Source: Secondary Research, Primary Research, MRFR Database, and Analyst Review

The European healthcare BPO market is the world's second-largest, owing to improved patient care, a high percentage of claim records, and the region's high concentration of key players such as Accenture (Republic of Ireland). Additional factors contributing to developing the market of healthcare BPO in the European region include the rise in the number of people seeking insurance, the expansion of internally coached professionals with specialized skills, and the affordability of the workspace. Furthermore, the UK market of healthcare BPO held the largest market share, while the France market of healthcare BPO is the fastest-growing market in the European region.

The Asia-Pacific Healthcare BPO Market is expected to grow at the fastest CAGR from 2022 to 2030. The market's expansion can be attributed to rapidly increasing awareness levels about outsourcing healthcare IT services and the growing presence of prominent market players in the region. Moreover, the growing number of people seeking insurance, the pressure to reduce healthcare delivery costs, healthcare system consolidation, the pharmaceutical industry facing patent cliffs, and the required implementation of ICD-10 codes are key factors further driving the growth of the Asia Pacific market of healthcare BPO. Developing healthcare systems and information technology infrastructure is boosting regional market value. The region's two largest emerging economies, China & India, are further promoting regional market expansion. China's market of healthcare BPO held the largest market share, and the Indian market of healthcare BPO was the fastest-growing market in the Asia-Pacific region.

Healthcare BPO Key Market Players & Competitive Insights

Major market players are developing several strategic activities to broaden their company reach and gain a competitive advantage in the industry. In the current market environment, IBM, Truven Health, and Infosys dominate the market. The company's dominant position can be attributed to its broad range of services and increased emphasis on strategic planning, including mergers and acquisitions. Healthcare BPO industry competitors must offer cost-effective services to expand and sustain in an intensely competitive and consistently growing market environment.

In response to these positive market trends, several businesses providing healthcare BPO solutions and services made substantial investments in R&D activities. These R&D strategies have led to the development of services and products tailored to the individual requirements of their customers. Thus, introducing new applications and solutions significantly contributes to the market's expansion over the forecast period. As a result, rising demand for billing & accounts management solutions with diverse applications will propel healthcare BPO industry growth in the coming years. The leading healthcare BPO companies engage in mergers and acquisitions, alliances and collaborative partnerships, and new source progression to increase market share.

Xerox supports the top 20 commercial health plans in the United States, reaching nearly two-thirds of the insured population and handling more than 900 million health insurance claims annually. Xerox offers BPO solutions to various sectors, including healthcare, financial services, banking, travel, retail, education, pharmaceuticals, technology, and communications. In April 2021, Xerox Corp. acquired Groupe CT, an independent provider of document management services in eastern Canada, incorporating its expertise and governance in document management solutions with Xerox's portfolio of workplace solutions to boot up transformational change.

Also, NTT DATA is a leader in healthcare BPO, assisting clients in implementing transformational processes and technologies. End-to-end administrative services from the company help streamline healthcare operations, improve productivity, and strengthen cash flow to stay competitive and improve member satisfaction. In May 2021, NTT DATA and ScoreData agreed to a multi-year contract under which NTT DATA would use ScoreData's nudge engines in conjunction with its own Artificial Intelligence (AI) solutions to forecast the risk of early onset of chronic diseases for the healthcare coverage and provider communities.

Key Companies in the market of healthcare BPO include

- Accenture (Republic of Ireland)
- Infosys (India)
- GEBBS (U.S.)
- Hinduja Solutions (India)
- Truven Health (U.S.)

- EXL Service Holdings (U.S.)
- IBM (U.S.)
- Genpact (U.S.)
- UnitedHealth Group (U.S.)
- Centricx (U.S.)

Healthcare BPO Industry Developments

November 2023: Accenture (Ireland) acquired ConcentricLife (US), a healthcare marketing agency, to assist Life Sciences businesses in creating the best possible brand experience throughout the entire health journey. Accenture Song's ongoing commitment to provide end-to-end solutions for its Life Sciences clients through pertinent communications and experiences that are tailored to the constantly changing needs of patients and healthcare professionals is reinforced by this purchase.

May 2023: EXL Service Holdings (US) introduced a generative AI platform to assist customers in using AI to revolutionize their businesses. The platform blends the fundamentals of generative AI models with data engineering know-how, AI solutions, and proprietary data sets from EXL. Based on EXL's extensive knowledge in AI-driven digital transformation, which enhances operational processes, yields fresh business perspectives, and offers more customized consumer experiences, the new suite of solutions will assist companies in growing AI projects across the board

Healthcare BPO Market Segmentation

Healthcare BPO Payer Service Outlook

- Claims Management
- Integrated Front-end Services & Back-office Operations
- Member Management
- Billing & Accounts Management
- Analytics & Fraud Management
- HR

Healthcare BPO Provider Service Outlook

- Revenue Cycle Management
- Patient Care
- Patient Enrollment

Healthcare BPO Regional Outlook

- North America
 - US
 - Canada
- Europe
 - Germany
 - France
 - UK
 - Italy
 - Spain
 - Rest of Europe

- Asia-Pacific
 - China
 - Japan
 - India
 - Australia
 - South Korea
 - Australia
 - Rest of Asia-Pacific
- Rest of the World
 - Middle East
 - Africa
 - Latin America

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