

Report Information

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Care Management Solutions Market Research Report – Forecast to 2030

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Description:

Global Care Management Solutions Market Overview

Care Management Solutions Market size was valued at USD 21.35 billion in 2021. the care management solutions market industry is projected to grow from USD 24.26 billion in 2022 to USD 87.50 billion by 2030, exhibiting a compound annual growth rate (CAGR) of 17.39 % during the forecast period (2022 - 2030). The increasing prevalence of chronic diseases and rising adoption of electronic medical records (EMR) are driving market growth.

[Care Management Solutions Market Overview](#)

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

Care Management Solutions Market Trends

- Increasing prevalence of chronic diseases to boost market growth

A disease that lasts for a prolonged time is known as a chronic disease. According to the Centre for Diseases Control and Prevention in 2019, the prevalence of chronic diseases in adults was around 60% globally, and it is reportedly much higher among elderly people. It is estimated that about 70% of adults will die of one or more chronic diseases. The rising prevalence of chronic diseases such as cardiovascular disorders, cancer, diabetes, respiratory disease, arthritis, chronic kidney disease, and other chronic diseases demands care management solutions to assist patients with chronic conditions in managing their health. For instance, according to the World Health Organization (WHO), in 2019, an estimated 17.9 million individuals died from cardiovascular diseases, accounting for 32% of all global deaths. 85% of these deaths were caused by a heart attack or a stroke. Additionally, according to the WHO, cancer is the primary or second leading cause of death in 112 of 183 nations before the age of 70. Similarly, GLOBOCAN 2020 estimates cancer incidence worldwide, with an estimated 19.3 million new cancer cases in 2020. Thus, the growing prevalence of cardiovascular diseases, cancer, and other chronic diseases is anticipated to fuel the care management solutions market growth during the assessment period.

Care management solutions provide all-encompassing care management software & services to improve care quality, decision-making, and clinical outcomes. They are implemented with educational & consulting services by methods such as face-to-face consulting and consulting on phones through the service provider allotted to the patient. Hence, the rise in chronic diseases drives market growth.

Care Management Solutions Market Product Insights

Care Management Solutions Component Insights

The Care Management Solutions Market segmentation, based on component, includes software and services. The software segment held the largest market share in 2021, and the services segment is anticipated to be the fastest growing segment during the forecast period. The software supports many functions related to care management solution, such as patient records, patients' history related to the disease as well as insurance covered in the treatment, e-prescription, diagnostic reports and others. Moreover, the care management software can be used in many ways such as when the hospital needs a detailed information about the patient, they can access the software and gather all the related information at one click. The market growth of software segment is attributed to the growing number of software tools developed for care management solution. Additionally, a growing number of companies engaged in developing the software are expected to contribute to the market growth of the segment.

Figure 2: Care Management Solutions Market, by Component, 2021 & 2030 (USD Billion)

[Care Management Solutions Market, by Component, 2021 & 2030](#)

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

August 2020:ZeOmega, Inc. launched Jiva Interoperability Solutions, a suite of connectivity tools and services designed to enable compliance with patient access, provider directory, and payer-to-payer data exchange.

Care Management Solutions Application Insights

Based on application, the global care management solutions industry has been segmented into disease management, case management, utilization management EMR management and others. The disease management segment held the largest market share in 2021 and is anticipated to be the fastest-growing segment during the forecast period 2022-2030. Disease management programs are intended to improve the health of people with chronic

conditions and lower the costs associated with avoidable complications by identifying and treating chronic conditions more quickly and effectively, thereby slowing the progression of those diseases. Moreover, disease management promotes healthy lifestyles by focusing on prevention, such as risk factor modification, hospitalization reduction, medication adherence, and healthcare access.

March 2022 Epic Systems has launched an environment software service that will give small and independent physician groups access to Epic electronic health records.

Care Management Solutions Mode of Delivery Insights

Based on mode of delivery, the global care management solutions industry has been categorized into web-based, cloud-based and on-premises. The cloud-based segment held the largest market share in 2021 and is anticipated to be the fastest-growing segment during the forecast period. Cloud-based online software aids in the delivery of various services via the internet, such as SaaS or on-demand models. Users access the cloud-based online software via the internet after it has been installed and managed by a vendor's cloud computing infrastructure. This software operates in a manner similar to the on-premises model. The main benefit, however, is that end users such as healthcare software companies, hospitals, and other health centers do not have to purchase their software. This software is inexpensive and simple to update. Aside from that, the maintenance costs are low. One of the reasons why users are adopting cloud-based is the ease with which they can switch from servers to the cloud, which improves access to information.

Care Management Solutions End User Insights

Based on end user, the global care management solutions industry has been categorized into payers, providers and others. The providers segment held the largest market share in 2021 and is anticipated to be the fastest-growing segment during the forecast period. Doctors, chiropractors, physical therapists, nurses, pharmacies, hospitals, clinics, diagnostic laboratories, and imaging centers are examples of healthcare providers. Many healthcare providers have launched care management portals as the medical industry has shifted its focus to patient-centric care. As a result, an increasing number of patients and hospitals enrol in and use these services. According to the American Hospital Association (AHA) approx. 4 in 10 hospitals i.e., 41% reported that the providers at the hospital are able to receive and send secure electronic messages containing patient health information to and from sources outside of the organization or hospital system.

Care Management Solutions Regional Insights

By Region, the study segments the market into North America, Europe, Asia-Pacific, and the Rest of the World. The growth of North America care management solutions market is attributed to the presence of key market players and health-tech awareness among population.

Further, the major countries studied are the U.S., Canada, Germany, France, the UK, Italy, Spain, China, Japan, India, Australia, South Korea, and Brazil.

Figure 3: CARE MANAGEMENT SOLUTIONS MARKET SHARE BY REGION 2021 (%)

CARE MANAGEMENT SOLUTIONS MARKET SHARE BY REGION 2021

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

North America care management solutions market accounts for the largest market share due to the presence of key market players in region, demand for patient-centred support system for managing medical conditions, compatible technical and healthcare infrastructure as well as health-tech awareness among population. Furthermore, the US care management solutions market held the largest market share and Canada care management solutions market accounting for the second largest market in North America.

The Asia-Pacific care management solutions market is expected to grow at a highest rate from 2022 to 2030. This is due to increased medical tourism, expansion of healthcare facilities, adoption of healthcare wearables among urban population and investment in R&D activities and new solution development. Moreover, the China care management solutions market held the largest market share, and the Japan care management solutions market was the fastest growing market in the Asia-Pacific region.

Care Management Solutions Key Market Players & Competitive Insights

The Care Management Solutions Market is distinguished by the presence of numerous global, regional, and local players catering to the increasing prevalence of chronic diseases. Furthermore, the improving infrastructure and increasing adoption of care management solutions is further driving the growth of the Care Management Solutions Market during the forecast period. The major players have adopted a strategy of obtaining regulatory approval from government agencies for their products and signing contracts and agreements to broaden their reach and reduce operational costs. For instance, in May 2022, ZeOmega, the leading population health management organization, has partnered with HealPros, a healthcare services company. This partnership is anticipated to yield significant results for health plans and their members by helping them access personalized care and deliver in-home experiences people love.

The Care Management Solutions Market is extremely competitive, with players competing, partnering, and investing heavily in research and development to gain a significant market share. The market is moderately fragmented with rising competition, product launches, increasing collaborative partnerships, and other strategic decisions to achieve operational efficiency.

There are various companies operating in the Care Management Solutions Market. Koninklijke Philips N.V. (Netherlands), formerly Koninklijke Philips Electronics NV, changed its name in May 2013. The company has a strong sales and distribution network worldwide and operates in over 100 countries. Philips offers products through medical devices, health systems, cardiology, health tech, oncology, respiratory, fertility, and pregnancy segments. It deals in maternity care, childcare, and oral healthcare products; male grooming & beauty products; food preparation & home care products; and sleep & respiratory care products. It offers solutions including lung cancer orchestrator and DynaCAD lung in the care management solutions market.

Key Companies in the Care Management Solutions market includes

- Koninklijke Philips NV (Netherlands)
- Oracle Corporation (US)

- Meddecision Inc (US)
- ExlService Holdings, Inc (US)
- Zyter, Inc. (US)
- Athenahealth (US)
- ZeOmega (US)
- Epic Systems Corporation (US)
- Cognizant (US)
- Allscripts Healthcare, LLC (US) among others

Care Management Solutions Industry Developments

March 2022:Cognizant collaborated with Microsoft (US) to deliver a new digital health solution to enhance remote patient monitoring for improved medical care.

October 2021:Allscripts Healthcare LLC launched Allscripts Guided Scheduling, an artificial intelligence scheduling application that uses real-time provider, practice, and industry data to optimize providers' workdays.

September 2021:Epic Systems Corporation and Walmart (US) partnered to provide Epic's patient portal to Walmart's customers to simplify their healthcare.

Care Management Solutions Market Segmentation

Care Management Solutions Component Outlook

- Software
- Services

Care Management Solutions Application Outlook

- Disease Management
- Case Management
- Utilization Management
- EMR Management
- Others

Care Management Solutions Mode of Delivery Outlook

- Web-Based
- Cloud-Based
- On-Premises

Care Management Solutions End User Outlook

- Payers
- Providers
- Others

Care Management Solutions 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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