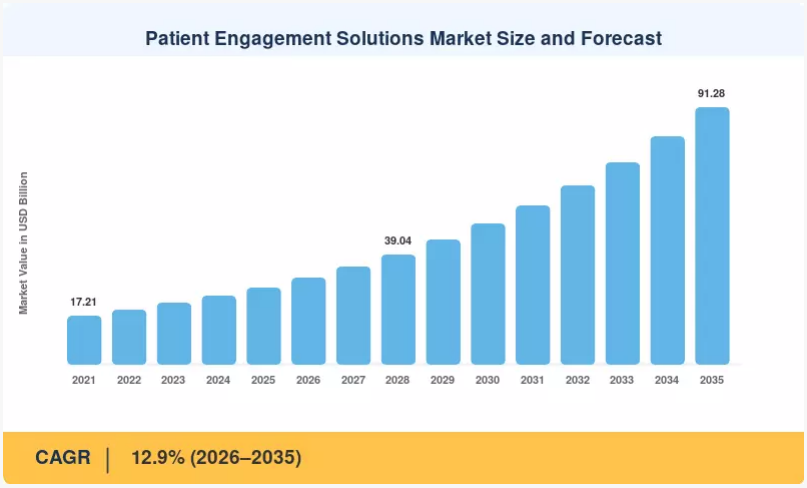
Patient Engagement Solutions Market to reach USD 91.28 Billion by 2035 at 12.9% CAGR

Patient Engagement Solutions Market to Surge from USD 27.13 Billion in 2025 to USD 91.28 Billion by 2035—Powered by Regulatory Mandates for Patient Data Access



Patient Engagement Solutions Market (2026 - 2035)

NY, CA, UNITED STATES, September 10, 2026 /EINPresswire.com/ -- As per Market Research Future, the global Patient Engagement Solutions Market size is projected to reach USD 91.28 Billion by 2035 from USD 27.13 Billion in 2025, at a CAGR of 12.9% during the forecast period 2026–2035. The market base was estimated at USD 27.13 Billion in 2025, with the first year of the forecast period (2026) valued at USD 30.63 Billion.

The 12.9% CAGR is propelled by three converging forces: regulatory mandates for patient data access, with the CMS Interoperability and Prior Authorization Final Rule (CMS-0057-F) obliging impacted payers to stand up Patient Access and Provider Access APIs by January 2027 and reducing prior authorization decision delays to 72 hours for expedited requests; value-based care and risk-bearing contracts, with almost 53.9% of US healthcare payments made through value-based arrangements, turning engagement from a satisfaction indicator into a margin input; and chronic disease burden and ageing populations, with WHO estimating that noncommunicable diseases kill 43 million people a year and the proportion of the world's population aged 60 years and older projected to reach 22% by 2050.

Global regulatory agencies and healthcare leaders are amplifying this momentum. The 21st Century Cures Act information-blocking provisions have made same-day release of clinical notes and results the operating default across US health systems. US federal outlays under the ONC and TEFCA programs, combined with roughly USD 10.7 billion of private digital-health funding recorded in 2024, have underwritten the replacement cycle. Germany's Hospital Future Act committed roughly EUR 4.3 billion of federal and state funding to hospital digitisation, with patient portals among the eligible funding categories. North America holds 42.6% of global

revenue in 2025, supported by the deepest reimbursement base and the strictest data-access mandates, while Asia-Pacific grows fastest at a 15.8% CAGR through 2035, propelled by India's Ayushman Bharat Digital Mission and China's tiered hospital informatisation targets.

Request A Free Sample:
https://www.marketresearchfuture.com/sample_request/8373

Key Market Trends & Growth Drivers

Regulatory Mandates for Patient Data Access

The Patient Engagement Solutions Market now has a new rule at the federal level. CMS-0057-F mandates that Medicare Advantage organizations, Medicaid managed care plans, and eligible health plan issuers on federal marketplaces operate FHIR-based Patient Access APIs from January 2027 and reduces prior authorization decision delays to 72 hours for expedited requests. CMS predicts around USD 15 billion in ten-year net savings from the rule. Much of this spending is driven by non-compliance risk, not return on investment.

Value-Based Care and Risk-Bearing Contracts

Risk contracts turn engagement from a satisfaction indicator into a margin input. In 2023, almost 53.9% of US healthcare payments were made through value-based arrangements under the Health Care Payment Learning and Action Network framework, and ACO REACH participants are fully at risk on total cost of care. Under those parameters, a missed follow-up visit or an unfilled prescription hits the provider's income statement right away, which is why outreach automation now clears capital committees on financial grounds.

Chronic Disease Burden and Ageing Populations

Demographics are the floor of demand. WHO estimates that noncommunicable diseases kill 43 million people a year, making up about 75% of all fatalities in the absence of a pandemic, and the proportion of the world's population aged 60 years and older is projected to reach 22% by 2050. Chronic illnesses need longitudinal communication between visits, not episodic encounters. Health systems buy engagement capacity to maintain panels they can no longer staff through clinic visits alone.

Cloud Migration and SaaS Unit Economics

The total cost of ownership debate is clearly won by hosted delivery. Health systems that move interaction tasks off on-premise infrastructure claim infrastructure cost savings in the 60–75% range when server refresh cycles, patching labor, and disaster-recovery duplication are accounted for. Per-user-per-month pricing also lowers the capital obstacle that previously kept critical-access hospitals and independent physician groups out.

Ask for Customization:
https://www.marketresearchfuture.com/ask_for_customize/8373

Market Segment Insights

BY COMPONENT

Software: Largest segment with 52.4% share in 2025 , the largest single component pool in the Patient Engagement Solutions Market. Licence revenue recurs while hardware refreshes on multi-year cycles.

Services: Fastest-growing component at 14.9% CAGR (2026–2035) , as implementation, change management, and optimisation retainers scale. Buyers discover that platform value depends on workflow redesign rather than deployment.

Hardware: Significant segment at USD 4.75 Billion in 2025, concentrated in check-in kiosks, bedside tablets, and monitoring peripherals.

BY DELIVERY MODE

Web-Based and Cloud-Based: Dominant segment with 65.4% share in 2025 , driven by scalability, continuous feature delivery, and low capital outlay. Per-user pricing removes the capital barrier that kept smaller providers out entirely.

On-Premise: Significant segment with 34.6% share in 2025 , concentrated in defence health systems and privacy-restrictive jurisdictions. That base is shrinking as cloud security certifications now routinely exceed what individual hospital IT departments can maintain.

BY APPLICATION

Population Health Management: Largest application with 26.4% share in 2025 , tied to risk-bearing contract growth. Maps onto the measures that determine payment under risk contracts.

Home Healthcare Management: Fastest-growing application at 16.4% CAGR (2026–2035) , pulled by acute-care-at-home waivers and monitoring codes that make continuous contact billable.

Social and Behavioral Management: Significant segment with 21.8% share in 2025 , driven by behavioural health screening mandates.

Financial Management: Significant segment at USD 4.75 Billion in 2025, driven by price transparency and rising patient responsibility.

BY END USER

Providers (Hospitals, Clinics, ACOs): Largest segment with 58.2% share in 2025 , driven by risk contract exposure and information-blocking compliance. Providers carry both the regulatory obligation and the clinical relationship.

Payers: Fastest-growing end user at 14.2% CAGR (2026–2035) , driven by Medicare Advantage star-rating economics. A half-star rating movement translates into bonus revenue that dwarfs platform cost.

Others: Significant segment at USD 4.15 Billion in 2025, spanning employers, government bodies, and life sciences sponsors.

Read Detailed Insights:
https://www.marketresearchfuture.com/reports/patient-engagement-solutions-market-8373

Regional Outlook

North America — Dominant Market (~42.6% Share, 2025)

United States: Generates approximately 88.4% of regional revenue , driven by CMS-0057-F API compliance deadline. Information-blocking penalties, ACO downside risk, and hospital price transparency requirements each independently justify platform spend.

Canada: Contributes USD 1.09 Billion, driven by provincial health information exchange programmes. Provincial health authorities procure centrally, so deal sizes are larger but cycles run longer.

Rest of North America: Fastest-growing at 12.1% CAGR (2026–2035) , driven by cross-border managed care expansion.

Europe — Second Largest (USD 7.08 Billion, 2025)

Germany: Holds 24.1% of regional share , driven by Krankenhauszukunftsgesetz digitisation funding. Patient portals are among the eligible funding categories, with audits tying disbursement to demonstrated capability.

United Kingdom: Contributes USD 1.55 Billion, driven by NHS App expansion and federated data platform.

France: Fastest-growing in the region at 13.4% CAGR (2026–2035) , driven by Mon espace santé national account rollout. France automatically provisioned accounts for the insured population.

Italy: Holds 9.2% of regional share , driven by PNRR telemedicine allocations.

Spain: Contributes USD 0.53 Billion, driven by regional health service portal upgrades.

Rest of Europe: Holds 22.5% of regional share , driven by European Health Data Space preparation. The regulation will make patient access to electronic health data an enforceable right across member states.

Asia-Pacific — Fastest-Growing Region (15.8% CAGR, 2026–2035)

China: Contributes USD 1.74 Billion, driven by tiered hospital smart-hospital rating requirements. The grading system scores institutions on patient-facing digital services, tying accreditation directly to portal and mobile capability.

India: Fastest-growing in the region at 16.9% CAGR (2026–2035) , driven by Ayushman Bharat Digital Mission registries. The digital mission has issued over 700 million health accounts and mandated registry participation for facilities seeking public scheme reimbursement.

Japan: Holds 18.3% of regional share , driven by ageing population and My Number health linkage. More than 29% of the population is aged 65 and over.

South Korea: Contributes USD 0.52 Billion, driven by MyData health information transmission rules.

Australia: Holds 7.1% of regional share , driven by My Health Record modernisation.

Middle East & Africa — Emerging Opportunity (USD 1.22 Billion, 2025)

Saudi Arabia: Holds 34.4% of regional share , driven by Vision 2030 health sector transformation. The Seha Virtual Hospital and Sehhaty application together reach a majority of the insured population.

South Africa: Contributes USD 0.21 Billion, driven by National Health Insurance pilot infrastructure.

Rest of Middle East & Africa: Fastest-growing at 14.6% CAGR (2026–2035) , driven by sovereign wealth-funded hospital construction.

South America — Growing Presence (12.1% CAGR, 2026–2035)

Brazil: Anchors the region with 52.7% of revenue , driven by Rede Nacional de Dados em Saúde and Meu SUS Digital. The national health data network provides shared identity and record

infrastructure that private operadoras build on top of.

Argentina: Contributes USD 0.21 Billion, driven by provincial hospital network digitisation.

Competitive Landscape and Recent Developments

Concentration in the Patient Engagement Solutions Market is moderate, with the top five vendors holding an estimated 30–38% of global revenue. EHR incumbents win on integration depth and bundling; independents win on multi-EHR neutrality and workflow specialisation.

KEY COMPANIES AND RECENT MILESTONES

Oracle Health (Cerner) (October 2024): Announced a rebuilt, AI-native electronic health record with an embedded clinical AI agent, signalling that conversational interfaces will ship inside core systems rather than as add-ons. Bundles engagement with EHR estate. Estimated ~8–11% revenue share.

Epic Systems (August 2024): Expanded generative AI draft-reply functionality for portal messages across its customer base, addressing inbox burden identified as a primary adoption constraint. Deepest integration; dominant in large academic systems. Estimated ~7–10% revenue share.

Veradigm: Ambulatory focus with data-network monetisation through FollowMyHealth and payer-provider data exchange. Estimated ~5–8% revenue share.

athenahealth: Cloud-native, strong in independent physician groups with patient portal, self-scheduling, and automated outreach. Estimated ~4–7% revenue share.

Phreesia (May 2024): Extended its intake platform into health-related social needs screening and closed-loop referral workflows, targeting new Joint Commission requirements. Estimated ~3–6% revenue share.

Other Key Players: GetWellNetwork (~3–5%), Solutionreach (~2–4%), TruBridge (~2–4%), ModMed (Klara) (~1–3%), Orion Health (~1–3%), Vivify Health (~1–2%).

Recent Industry Developments:

CMS (January 2024): Finalised the Interoperability and Prior Authorization Rule (CMS-0057-F), setting January 2027 compliance dates for Patient Access, Provider Access, and Payer-to-Payer APIs.

European Commission (March 2025): Adopted the European Health Data Space regulation, establishing enforceable patient access rights to electronic health data and phased application timelines through 2029.

HHS Office for Civil Rights (December 2024): Proposed strengthened HIPAA Security Rule requirements including mandatory encryption and multi-factor authentication.

Future Outlook: 2026–2035

The Patient Engagement Solutions Market is projected to reach USD 91.28 Billion by 2035, growing at a CAGR of 12.9%, driven by regulatory mandates, value-based care adoption, and chronic disease burden.

New opportunities lie in:

Agentic AI and Autonomous Outreach: Autonomous agents will handle the majority of routine patient contact by the early 2030s, reshaping cost structures across the market, with the next step being closed-loop action where an agent reschedules, reorders a prescription, and updates the record.

Emerging-Market National Digital Health Programmes: India's Ayushman Bharat Digital Mission has issued more than 940 million health accounts and publishes open registries for facilities and practitioners, removing the identity-resolution problem that usually consumes early project effort.

Outcomes-Linked Contracting and De-Identified Data Products: At-risk pricing tied to no-show reduction, medication adherence, or annual wellness visit completion transfers performance risk to the vendor and commands premium rates when targets are met.

Payer-Side Star Ratings and Quality Economics: Engagement platforms that lift survey response, close gaps in care, and manage annual wellness visit scheduling map directly onto star rating measures, explaining the segment's 14.2% growth rate.

Care-at-Home Supercycle: Hospital-at-home shifts the engagement layer from convenience to clinical necessity, with the platform carrying vitals, escalation alerts, and family communication becoming the monitoring station.

Accessibility, Equity, and Non-Financial Reporting: The European Accessibility Act applies to consumer-facing digital services from June 2025, and the Corporate Sustainability Reporting Directive requires large operators to disclose social impact metrics.

By 2035, the Patient Engagement Solutions Market is expected to achieve substantial growth, reflecting the transformation of patient engagement from optional convenience tools to regulated healthcare infrastructure.

More Related Research Insights:

https://www.marketresearchfuture.com/fr/reports/pain-management-market-5975

https://www.marketresearchfuture.com/ja/reports/pain-management-market-5975

https://www.marketresearchfuture.com/de/reports/pain-management-market-5975

https://www.marketresearchfuture.com/fr/reports/neuropathic-pain-market-1390

https://www.marketresearchfuture.com/ja/reports/neuropathic-pain-market-1390

https://www.marketresearchfuture.com/de/reports/neuropathic-pain-market-1390

https://www.marketresearchfuture.com/es/reports/neuropathic-pain-market-1390

https://www.marketresearchfuture.com/zh-cn/reports/neuropathic-pain-market-1390

https://www.marketresearchfuture.com/ko/reports/neuropathic-pain-market-1390

https://www.marketresearchfuture.com/fr/reports/medical-display-monitor-market-33246

Market Research Future
Market Research Future
+1 855-661-4441
email us here

This press release can be viewed online at: https://www.einpresswire.com/article/941188815

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.
© 1995-2026 Newsmatics Inc. All Right Reserved.