

US HEALTHCARE BEYOND THE PILL

**Digital Tech and New
Partnerships Bring New Life
to the Industry**

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US HEALTHCARE BEYOND THE PILL: DIGITAL TECH AND NEW PARTNERSHIPS BRING NEW LIFE TO THE INDUSTRY

Pharmaceutical manufacturers, payers and healthcare providers (HCPs)—as well as a host of tech-focused newcomers—are exploring digital programs that complement standard therapies and hold promise to keep patients healthier and produce better outcomes. Known as “beyond-the-pill” or “around-the-pill” services, they have been a long time coming, and may finally be gaining traction.

- The healthcare industry is under pressure to go beyond the pill for a number of reasons: escalating costs, a shift to outcomes-based compensation, demands from digitally savvy patients and the need to competitively differentiate offerings.
- Healthcare companies and other industry stakeholders are acquiring, partnering or otherwise collaborating with tech and telecom companies to develop a crop of personalized and patient-centric tools. These are fueled by mobile and wireless technology, artificial intelligence (AI), big data and the internet of things (IoT).
- Medication adherence and chronic disease management are two of today’s most persistent and expensive healthcare problems. The majority of beyond-the-pill programs are aimed at tackling one or both of these issues.
- Many beyond-the-pill solutions are still in the very early stages of development. They still face technology, regulatory and privacy hurdles, but have potential to deliver significant future value.

WHAT’S IN THIS REPORT? This report examines some of the ways health-related companies are developing beyond-the-pill services to tackle two persistent problems that drive up costs and make the US healthcare system less efficient: medication adherence and chronic disease management.

Mobile Health App Categories with the Greatest Market Potential According to mHealth Professionals Worldwide, June 2016

% of respondents

Remote monitoring	32%
Diagnostic apps	31%
Medical condition management	30%
Remote consultation	29%
Patient health record	28%
Fitness tracking	27%
Nutrition and weight loss	26%
Reminders and alerts	18%
Medical compliance	16%

Note: in the next 5 years

Source: research2guidance, “mHealth App Developer Economics 2016,” Oct 10, 2016

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KEY STAT: Health professionals worldwide believe mobile health apps related to remote monitoring, diagnostics and medical condition management will have the greatest market potential over the next five years.

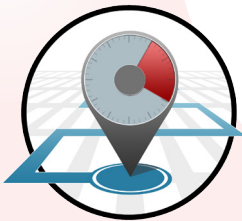
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