US HEALTHCARE BEYOND THE PILL

Digital Tech and New Partnerships Bring New Life to the Industry

JANUARY 2017

Victoria Petrock

Contributors: Annalise Clayton, Sean Creamer, Maria Minsker
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**

<table>
<thead>
<tr>
<th>Category</th>
<th>% of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remote monitoring</td>
<td>32%</td>
</tr>
<tr>
<td>Diagnostic apps</td>
<td>31%</td>
</tr>
<tr>
<td>Medical condition management</td>
<td>30%</td>
</tr>
<tr>
<td>Remote consultation</td>
<td>29%</td>
</tr>
<tr>
<td>Patient health record</td>
<td>28%</td>
</tr>
<tr>
<td>Fitness tracking</td>
<td>27%</td>
</tr>
<tr>
<td>Nutrition and weight loss</td>
<td>26%</td>
</tr>
<tr>
<td>Reminders and alerts</td>
<td>18%</td>
</tr>
<tr>
<td>Medical compliance</td>
<td>16%</td>
</tr>
</tbody>
</table>

Note: in the next 5 years

**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.

---

**CONTENTS**

2 US Healthcare Beyond the Pill: Digital Tech and New Partnerships Bring New Life to the Industry
3 Why Go Beyond the Pill?
5 New Tech Lays Groundwork for Better Health
10 Beyond the Pill in Action
14 Best Practices for Developing Beyond-the-Pill Solutions
16 eMarketer Interviews
17 Related eMarketer Reports
17 Related Links
17 Editorial and Production Contributors
Coverage of a Digital World

eMarketer data and insights address how consumers spend time and money, and what marketers are doing to reach them in today’s digital world. Get a deeper look at eMarketer coverage, including our reports, benchmarks and forecasts, and charts.

eMarketer PRO Subscriptions: The Fastest Path to Insight

All eMarketer research is available to our clients via an eMarketer PRO subscription. The subscription provides clients with access to all eMarketer analyst reports, signature charts, interviews, case studies, webinars and more. See for yourself how easy it is to find the intelligence you need. Learn more about subscription options.

Confidence in the Numbers

Our unique approach of analyzing data from multiple research sources provides our customers with the most definitive answers available about the marketplace. Learn why.

Schedule a personalized demonstration or request a quote today.
Go to eMarketer.com, call 212-763-6010, or email sales@emarketer.com.