



IDC Health Insights Assesses Key Population Health Management Vendors in New IDC MarketScape

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FRAMINGHAM, Mass., October 4, 2016 – Market dynamics have driven the emergence of the population health management market. As the buzzword du jour, population health management is defined differently depending on with whom you are speaking. To establish a common definition and vendor inclusion criteria and provide clarity to healthcare executives before investing in technology, [IDC Health Insights](#) today announced the availability of a new IDC MarketScape report, [U.S. Population Health Management, 2016 Vendor Assessment](#) (Doc #US41689516). Vendors included in this IDC MarketScape include: Allscripts, Athenahealth, Caradigm, eClinicalWorks, Enli (formerly Kryptiq), IBM Phytel, McKesson, Meddecision, Optum, The Advisory Board Company, and Wellcentive.

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"As healthcare organizations transform to value-based reimbursement and care, the need for tools and methodologies to improve clinical and financial outcomes becomes critical," said [Cynthia Burghard](#), research director, IDC Health Insights. "At this nascent stage of population health management, the approaches have been based on historic approaches, with maturity, the need to be more precise in our analysis, more personalized in care plan development, and more proactive in patient engagement will grow."

A sampling of key findings from this IDC MarketScape include:

- Population health management as defined by IDC Health Insights includes functionality to identify populations at risk or predicted to be at future risk as well as provider performance measurement, the ability to create and monitor care plans and, finally, the ability to communicate with communities of patients as well as with individual patients.
- Differentiators include the depth and breadth of analytic capability (patient risk identification and performance measurement), the degree of integration with electronic health records (EMRs), and the sophistication of care plan development.

- The number of Leaders doubled since 2014 with EMR vendors comprising 50%. There appears to be commoditization occurring in the market as we see clusters of vendors meaning there is limited differentiation.
- The market dynamics are changing as new entrants are actively competing and winning business. We are seeing an increased number of disease-specific population health management applications for patients with chronic illnesses.

"Since the publication of the *IDC MarketScape: Population Health Management, 2014 Vendor Assessment* there have been significant improvements to the technologies and expertise of the vendors. Some vendors have exited the market while others have for the first time qualified for inclusion. We expect market maturity will continue to grow at a rapid pace," added Burghard.

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants and end users. Market weightings are based on user interviews, buyer surveys and the input of a review board of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions within the IDC MarketScape, on detailed surveys, vendor reference interviews, publicly available information and other direct end-user insights in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior and capability.

For additional information about this report or to arrange a one-on-one briefing with Cynthia Burghard please contact Sarah Murray at 781-378-2674 or sarah@attunecommunications.com. Reports are available to qualified members of the media. For information on purchasing reports, contact insights@idc.com ; reporters should email sarah@attunecommunications.com.

About IDC MarketScape

[IDC MarketScape](#) vendor analysis model is designed to provide an overview of the competitive fitness of IT, telecommunications, or industry-specific suppliers in a given market. The research methodology utilizes a rigorous scoring methodology based on both qualitative and quantitative criteria that results in a single graphical illustration of each vendor's position within a given market. IDC MarketScape provides a clear framework in which the product and service offerings, capabilities and strategies, and current and future market success factors of IT, telecommunications, or industry-specific vendors can be meaningfully compared. The framework also provides technology buyers with a transparent foundation to allow companies to independently compare the strengths and weaknesses of current and prospective vendors.

About IDC Health Insights

IDC Health Insights assists health businesses and IT leaders, as well as the suppliers who serve them, in making more effective technology decisions by providing accurate, timely, and insightful fact-based research and consulting services. Staffed by senior analysts with decades of

industry experience, our global research analyzes and advises on business and technology issues facing the payer, provider and life science industries. International Data Corporation (**IDC**) is the premier global provider of market intelligence, advisory services, and events for the information technology market. IDC is a wholly-owned subsidiary of International Data Group (**IDG**), the world's leading media, data and marketing services company. For more information, please visit www.idc-hi.com, email info@idc-hi.com, or call 508-988-7900. Visit the IDC Health Insights Community at <https://idc-community.com/health>.

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