Global mHealth Developer Survey

research2guidance
the mobile research specialists

Survey Summary for Participants

November, 2010

This document is a summary of the results of the global developer interview survey

Market background

The advent of the "app economy" created a brand new interactive way to communicate with the market. This "Smartphone Applications Market Phenomena" has already impacted heavily on many industries, and that impact will only increase as smartphone penetration grows. Healthcare is one of these industries, and the opportunities for improving both healthcare delivery and the dissemination of medical information are yet to be fully understood.

Attracted by the overall market hype around smartphone applications, independent application developers and to a lesser extent traditional healthcare industry players have started to develop and market mHealth applications on the smartphone application stores.

The global mHealth market survey conducted in summer 2010 examines the opinions about key market trends of both start-up companies and mHealth and traditional healthcare market players that have had experience publishing applications for a smartphone platform.

Survey details

Objectives:

- Obtain developers' perception of mHealth status, drivers and barriers

Time:

- The survey was conducted in Summer 2010

Method:

- Online questionnaire

Participants:

- 231 companies involved in mobile health market

Reach:

- Global

Note: This document summarizes the information gathered during the interviews. It does not draw any conclusions or provide recommendations. For further insights, analysis and recommendations please see The Global mHealth Market Report 2010-2015.

Survey participants include (total 231 respondents)

3C Strategy Limited
Able Eye Device Co., Ltd
Abt Associates
Active Medicine
ACUMED
AEON Connected Health
Allina
Altys Technology
Anexim Sales Consulting Pvt. Ltd.
ANT Wireless div of Dynastream Innovations Inc.
antwerpes ag
Apollo Health Street
Apollo Life
APS Healthcare, Inc
Arcimboldo
Astellas Pharma Canada
AT&T
Axicare
Bainton
Bayer Healthcare Diabetes Care
Bayer Schering Pharma
Barco
Beijing KellyMed Co.,Ltd.
Benchmark Softec (P) Ltd
binaryHealthCare
BlinkMD VoiceSystems
Blue Latitude
Boehringer Ingelheim
Bosch Healthcare
Cancer Care Ontario
Card Guard
CareSpeak Communications
Catholic Healthcare West
CellTrak Tecnologies Inc.
Cidway Security SA
Clinovations, Inc.
CMC
Cognizant Technology Solutions
Colleen Shannon Medical Writing
com2health
CoMetrica

Complete Digital
CONSORTIUM SANTE FRANCE
Consulting
CSC
Darwin HC
DD Studio
Deepak Foundation
Federal Department of Health (Australia)
Derdack
Desert Oasis HealthCare
Detecon
Diacoustic Medical Devices
DocInfoTech
Docobo Ltd
DreamWeavers InfoCom Pvt. Ltd.
DRUGWRITE, LLC
DunavNET
Engage
EPG Health Media
Ericsson Nikola Tesla
Fabulous PR
FC Busienss Intelligence
felix burda stiftung
Fishawack
Fitness Fulfillment
FORTH Institute of Computer Science
Futurehealth
GDT: Group, LLC
GeoMed/FireKite
Globalpark AG
GlaxoSmithKline
GSMA
H3 System, Co., Ltd.
Health Innovation Partners LLC
Health Interactions
Health IQ
Healthagen, LLC
Hiliary Critchley Consulting, LLC
HomeCare HomeBase
Huawei
Humana
Hungarian Telekom

IBM
icom group
IKERLAN
iLabs Medical
IMS Health
Independent Management Consultant
Infisys Inc.
INFORSON
Innovacom
Instera
Intelecare, Inc.
iPLATO Healthcare
iSensa
ispace
Johns Hopkins Public Health
Kaweah Delta District Health Care
KM Group
KV IT consulting
Leap of Faith Technologies, Inc
LifeWIRE Corp
Logistics for Global Good
Magothy Group
Makina Corpus
mBricks AS
McCann Healthcare
MDeSolutions
MEDgle
Medical Connectivity Consulting
Medical Surveillance
MedicApp Corp Ltd
MediLogos
MediMedia USA
MedTech Media
MedWriter Limited
MHComm
mHealth-Mobile Solutions
Microx Solutions
Mobien Technologies Pvt. Ltd.
Mobile Flow
mobile zeitgeist
MobileWellbeing Inc.
Mobisante

National Institutes of Health
National Lab for Drug Control
NGN
NHS
Nokia
Novo Nordisk
NowPos M Solutions
Nurture Connect, Inc
Omnicom
Onlife Health, Inc.
Open Standard Solutions / medRF
Papageorge General Hospital
PatientenWielch GmbH
PatientKeeper, Inc.
Peak Biomedical Ltd
Persistent Systems
PharmiWeb Solutions
Photon infotech
PI
PMDEXP, Inc.
Powerwave Technologies Inc.
Praetorian Services PLC Inc.
Psion Teklogix Inc
PSL Group
Razoron Health Innovations
RegPoint Ltd
RememberItNow!
Rinfgroup
Roche (Diagnostics Division)
RSi Communications
Say Communications
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Salveo
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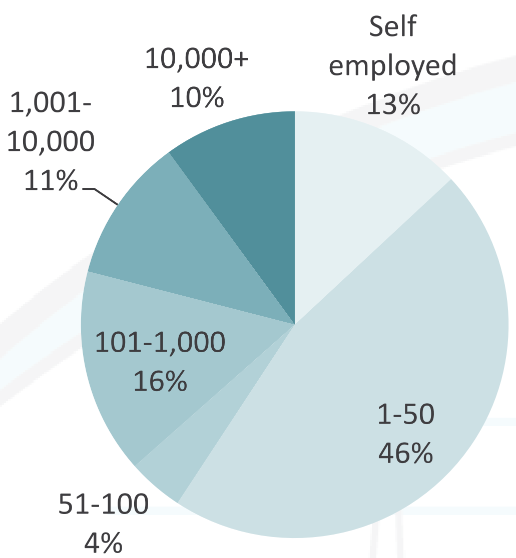
Tactio Software
Tata Teleservices Ltd
Telefónica I+D
TeleThrive
TELUS
Text to Change
Triple Play Consulting
TroyTyla
Turkcell
UnitedHealth Group
University of Bayreuth
Urgent Care America
Verizon Wireless
Vestreviken
Viable Synergy
VitalmHealth
Voxiva
VU
Walker
WebDispatch.com
WellDoc
Wellness & Health Innovation
What If
Zorgbeheer
And single experts

Summary

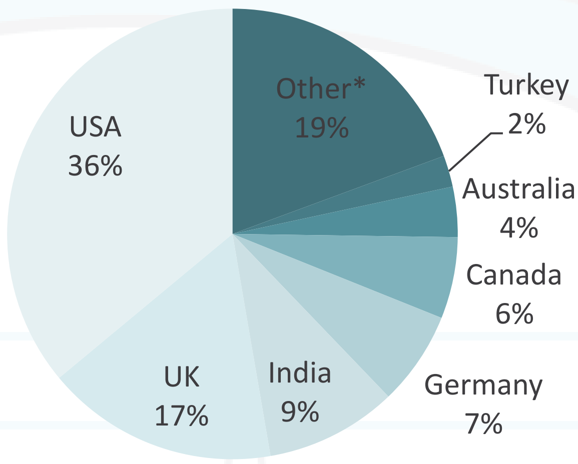
- The majority of participants forecast mHealth to breakthrough in the next five years.
- Nearly 80% of respondents see diabetes as the therapeutic area with highest business potential.
- Today healthcare interested people and clinical doctors are the main target groups for mHealth solutions, as seen by 61% and 58% of respondents, respectively.
- Mobile health solutions for patients and professionals differ a lot in their business potential: survey participants concentrate most on medication compliance and health tracking tools for patients, and on remote monitoring and continuing medical education solutions for professionals.
- Almost 70% of survey participants agree that app developers and agencies will be the main players in the market.
- Smartphone penetration is seen as the main driver for mHealth by 63% of respondents.
- Lack of standardization (50%), regulation (49%) and market transparency (49%) are the main barriers mHealth facing .
- Smartphones will offer the highest business potential for mHealth compared to other handheld devices.
- App stores will lose their role as main distribution channels for mHealth solutions.
- Android and iOS will be preferred mobile platforms for mHealth solutions.
- mHealth apps are seen as tools to improve communication between patients and healthcare professionals and amongst healthcare professionals.

The global survey involved small start-ups as well as large corporates, with an average of 27 months business experience in mHealth

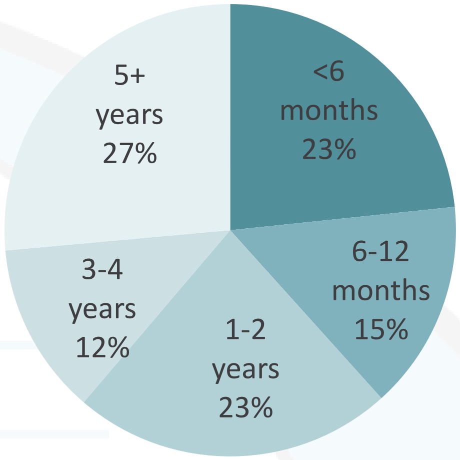
Participants by No. of employees



Participants by country



Company's experience in mHealth

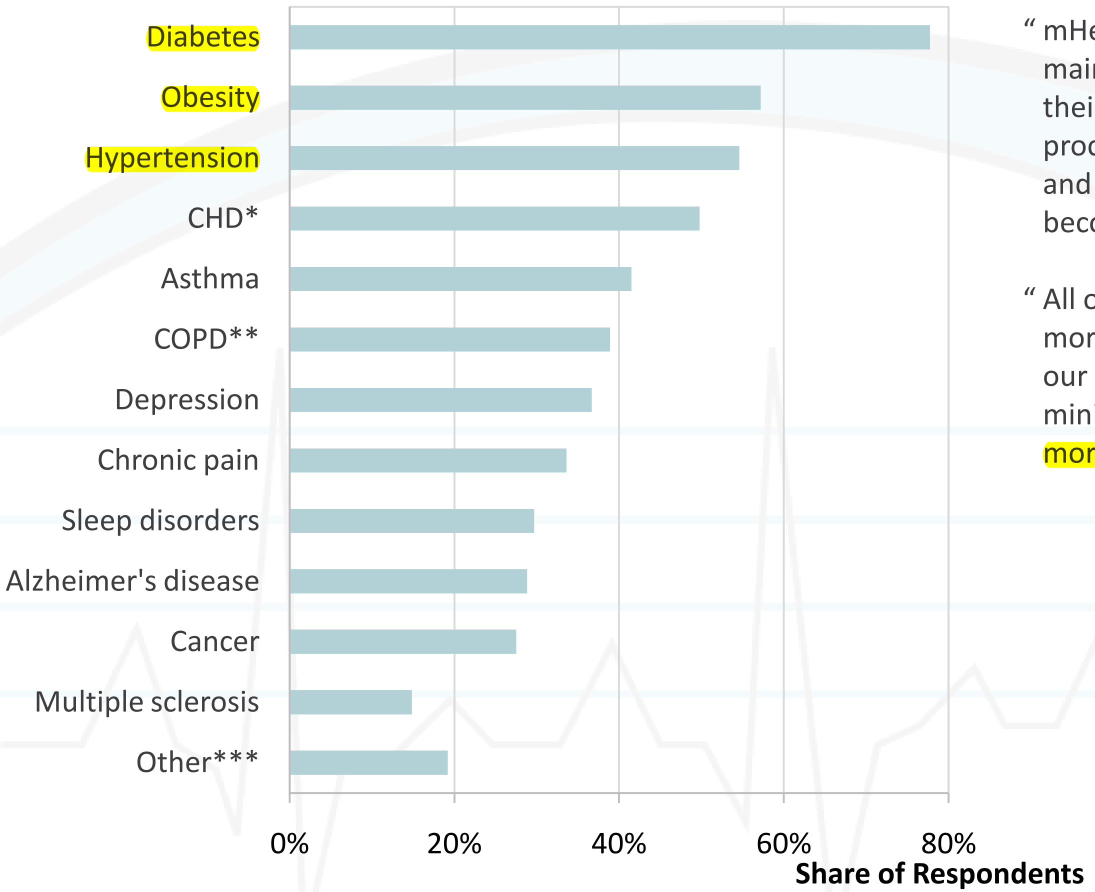


∅ 2.2 years

* Other countries include: Spain, Switzerland, South Africa, China, US, Greece, Belgium, Israel, Finland, Singapore, Norway, New Zealand, Tunisia, Sweden, Poland, UAE, Rwanda, Peru, Serbia, Japan, Croatia, Slovenia, Netherlands, Ireland, Hungary, South Korea

Diabetes is seen as the therapeutic area with highest business potential

Which therapeutic areas offer the best market potential for mHealth solutions?



" mHealth will enable us to learn about and maintain our health, helping the clinicians to know their patients better by enabling an interactive process based on actual, daily recorded metrics, and allow for treatment before the disease becomes chronic."

" All of these [applications] will enable us to be more health conscious and active, more aware of our own health and chronic conditions, helping minimize the acute episodes in our life, enabling a more healthy lifestyle."

* CHD refers to coronary heart disease

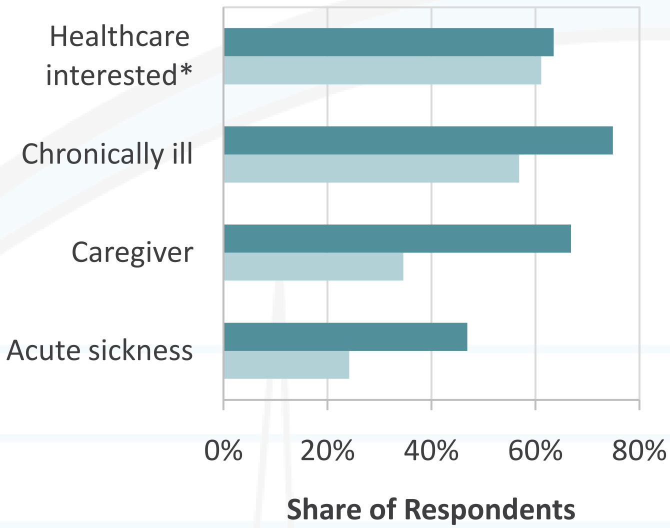
** COPD refers to chronic obstructive pulmonary disease.

*** Other chronic diseases such as HIV, Aids, epilepsy, infectious diseases, other less serious illnesses.

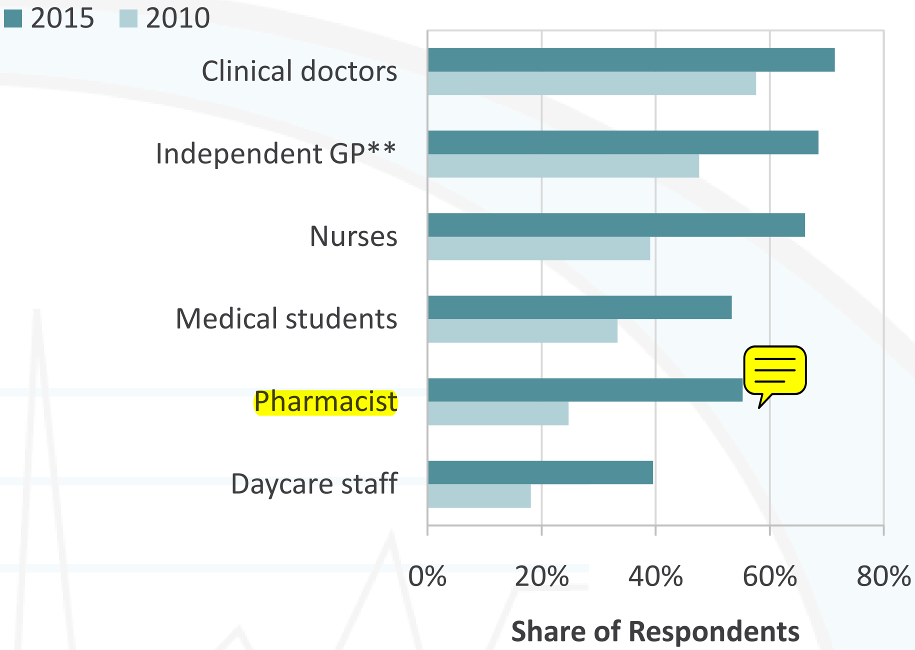
Today healthcare interested people and clinical doctors are the main target groups for mHealth solutions

What are and will be the main target groups for mHealth solutions?

Patients



Professionals



" A major target group, the elderly, will have issues with technology adoption, but will benefit most from mHealth applications."

" Clinicians are slow adapters when it comes to using IT. They are quite conservative about the source of info - research shows they are most likely to ask colleagues, check their own personal libraries, and search online for info, in that order of preference."

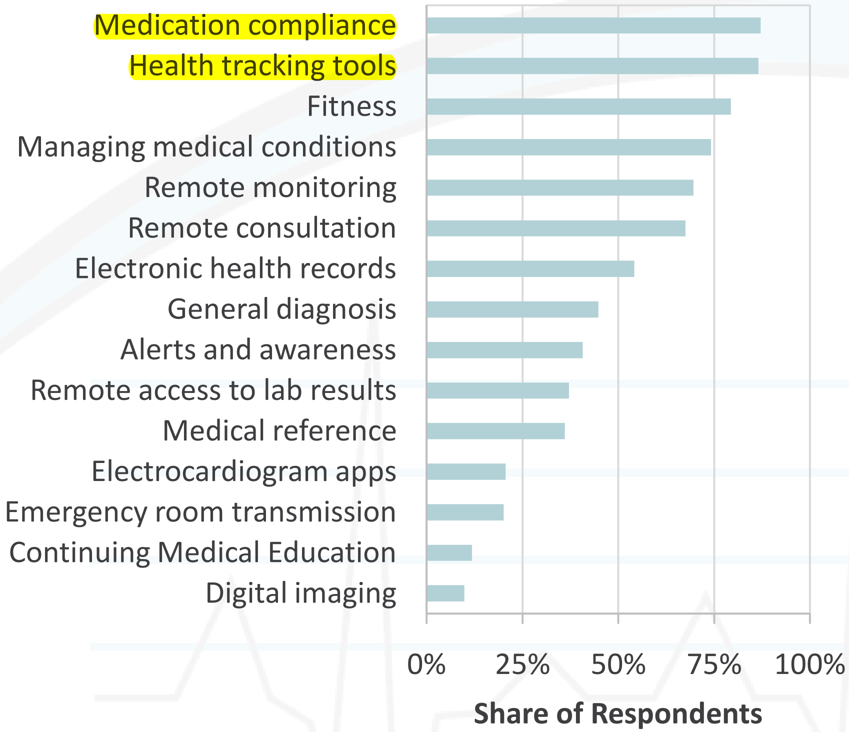
* Individuals that are highly interested in fitness, nutrition, and other health related issues.

** Independent general practitioner refers to doctors working outside of a hospital.

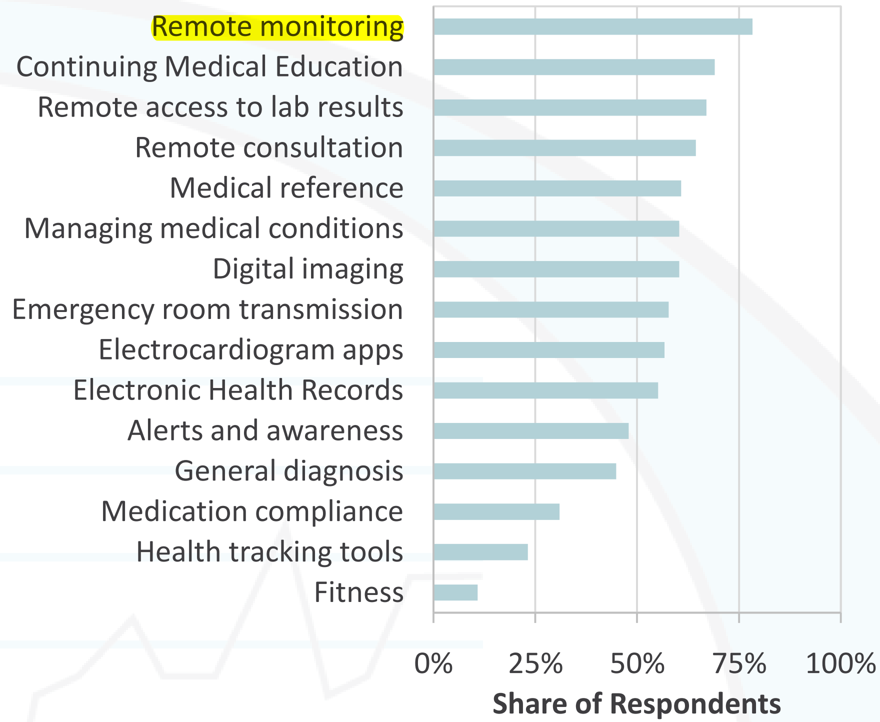
Mobile health solutions for patients and professionals differ a lot in their business potential

What mHealth solutions offer the biggest market potential for medical professionals and patients?

Patients



Professionals



" mHealth has the potential to prevent patients from being lost in the system after leaving the doctor's rooms. Consumers will be able to improve wellness in their daily lives, as with mHealth solutions they will remain "always connected" to their healthcare providers."

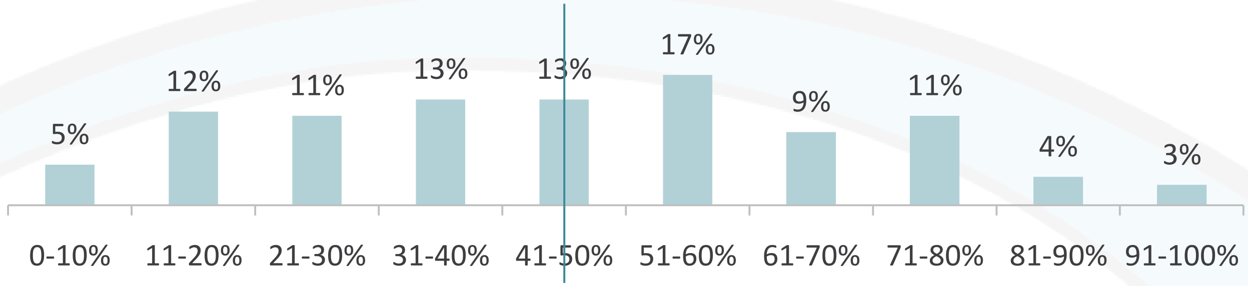
" A digital dialogue, centered around an individual patient and his 3D anatomical display, will be the future of virtual medical solutions."

Participants envision significant acceptance of mHealth solutions in 2015

What percentage of medical professionals and patients in developed countries* will use mHealth in 2015?

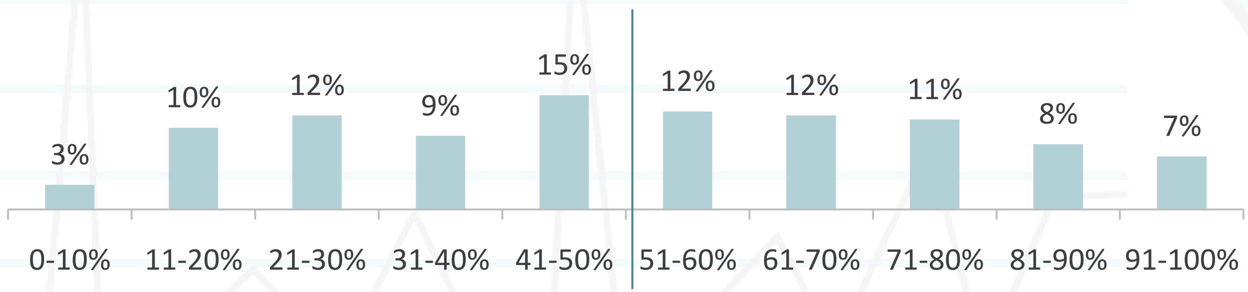
Patients

∅ 45%



Professionals

∅ 51%



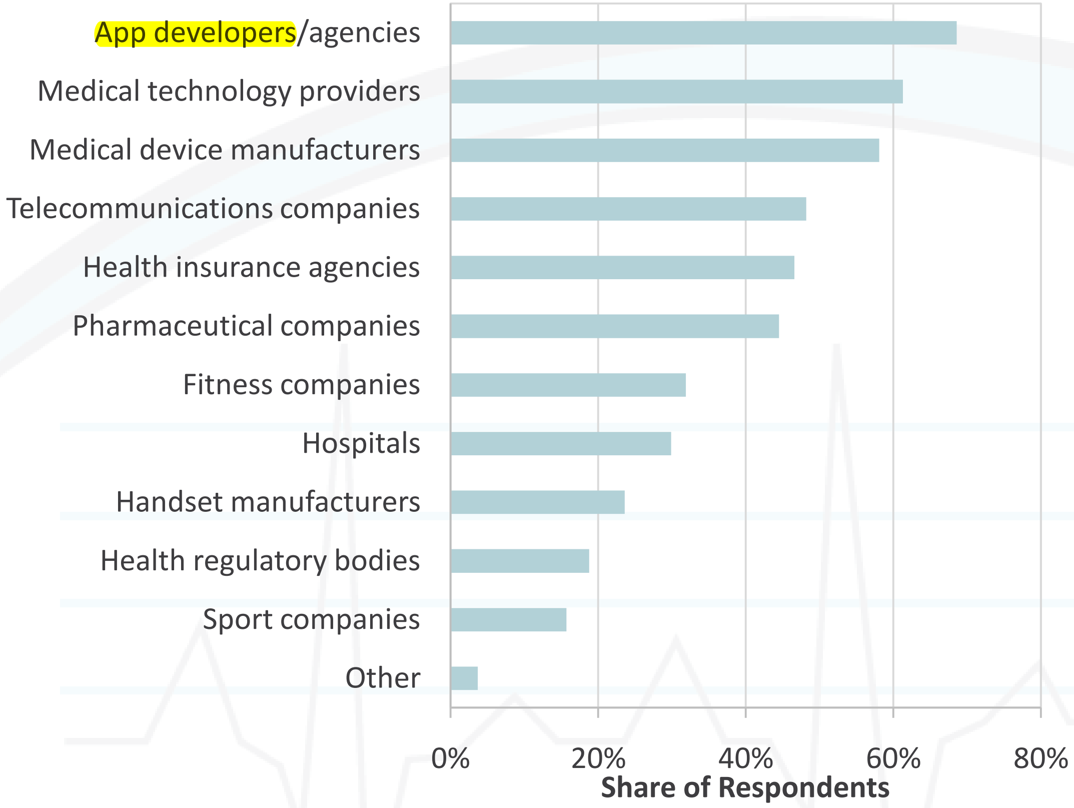
" It is well documented that the adoption of new clinical practices and technologies takes longer than 5 years. However, because healthcare is one of the global economy's largest industries even a 10% adoption/change would be very meaningful."

" It is likely that there will be a shortlist of mHealth solutions that achieve significant market penetration by 2015. These solutions will probably be clinically validated and reimbursed – as most healthcare products are."

* North America, Europe, Australia, Japan, South Korea, New Zealand (IMF definition).

App developers and agencies are seen as main players in the market

Which are the main players that will develop the mHealth market in the next 5 years?



" Doctors and medical practitioners are not leading the mHealth drive."

" For some of the advances to materialize, medical personnel conservatism needs to reduce whilst patients are educated. This is the role of the rest of the ecosystem, i.e. us 3rd party providers and the media."

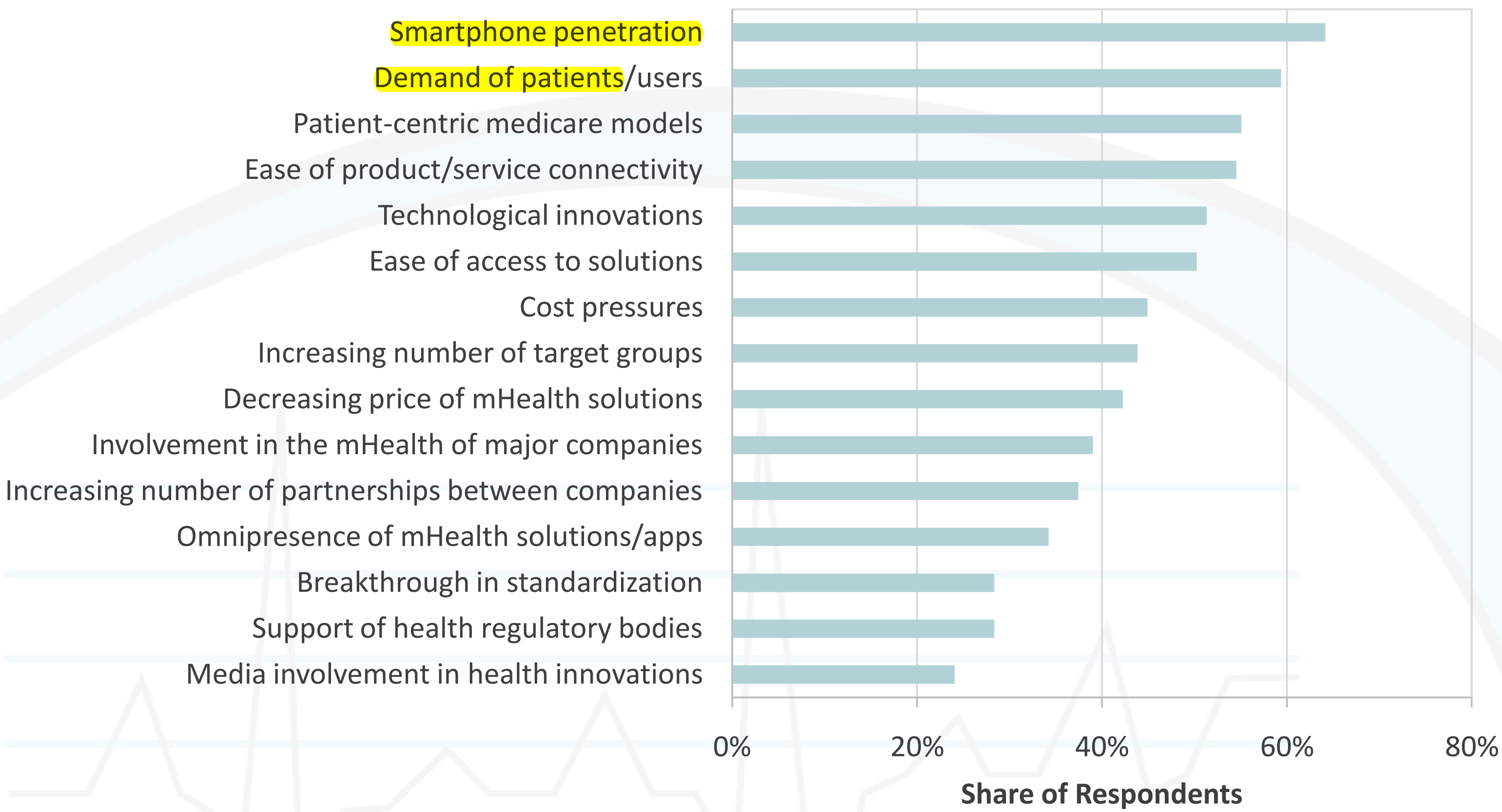
" The medical industry needs to work closely with the telecom industry, in order for mHealth applications to become a success."

" Health insurance agencies might work in developed but probably not in developing country health financing."

" Government and the health industry are the two most important factors and motivators to establish the mHealth platform for growth and to benefit end users."

Smartphone penetration is seen as the main driver for mHealth

What are the main driving forces for the growth of mHealth in upcoming years?



" At this phase clients (patients) will drive the demand with the help of innovators that will create more applications and will link them with providers. Health insurance companies and governments will understand the cost effectiveness of this and will promote its development."

" Continuous innovation challenges will drive the market as clients will demand more personalized and sophisticated apps."

" Lowering clinician resistance to anything that will put control in patients' hands will be critical to success."

Lack of standardization, regulation and market transparency are the main barriers of mHealth

What are the biggest barriers of mHealth in the upcoming years?

Barrier	Ranking (Share of Respondents)	Explanation
Lack of Standardization	50%	→ The lack of having standards on hardware and software will slow down market dynamic
Regulation	49%	→ Regulation will slow down innovation and development of mHealth solutions
Unaware of solutions	49%	→ People are not aware of mHealth solutions or find it hard to access them
Security	47%	→ Patients want to keep health information secure, strong encryption and authentication needed
Cost of solution	38%	→ Patients are not willing to pay for the solution. Costly development process
Readiness of patients	33%	→ People aren't ready for a change in their routine healthcare treatment
Target group mismatch	31%	→ There is a small percentage of the target group (e.g. elderly/chronic disease) that owns a smartphone
Unknown legitimacy	21%	→ Users will be reluctant to use apps since they can be developed by anyone
Technology readiness	19%	→ The technology isn't practical and affordable for a large enough market yet

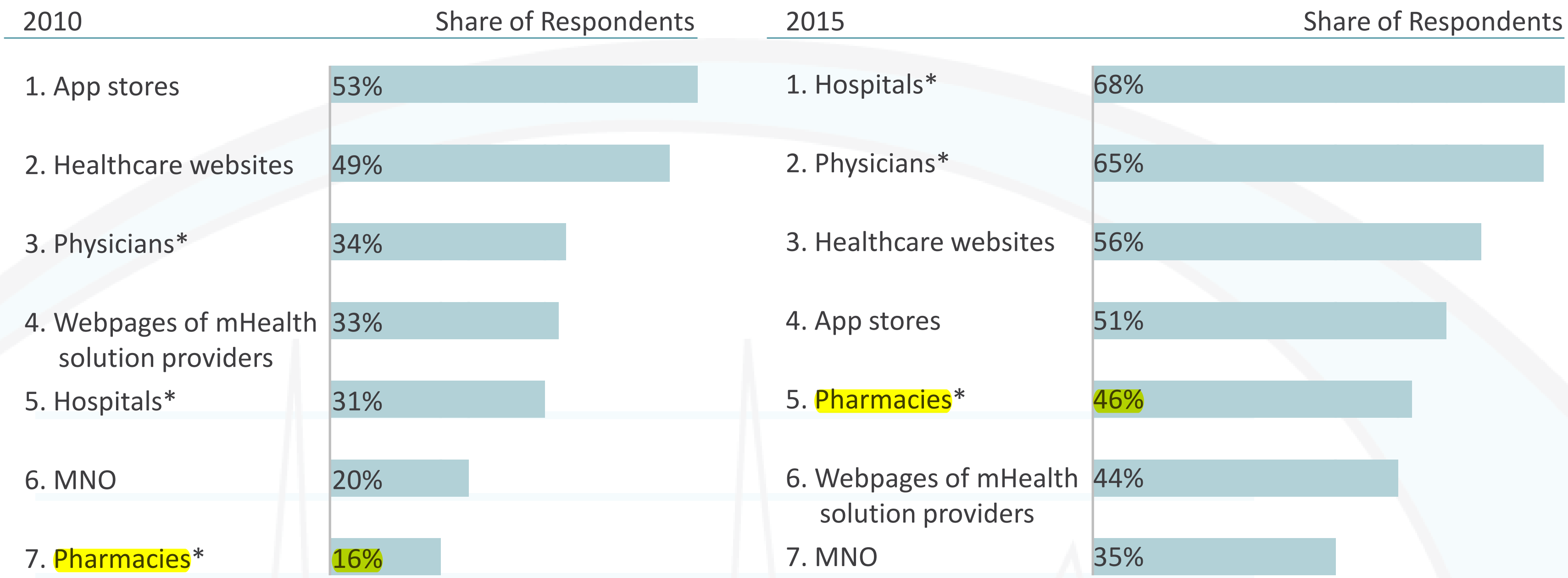
" One big problem is funding for innovative companies in the mHealth space. Everyone knows how huge this can be, but many VC firms and investment companies are scared to death of healthcare. They don't understand it and don't see the business model in supplying something that non-patients use (i.e. something only 50,000 physicians might buy)."

" mHealth solutions need a lot of safety, security, medical knowledge, etc., which is not readily available today in the market."

" Industry (or regulators) has to build common frameworks and platforms to suit interoperability of multiple bodies and devices."

App stores will lose their role as main distribution channels for mHealth solutions

What are the best distribution channels for mHealth solutions as of today and in 5 years time?



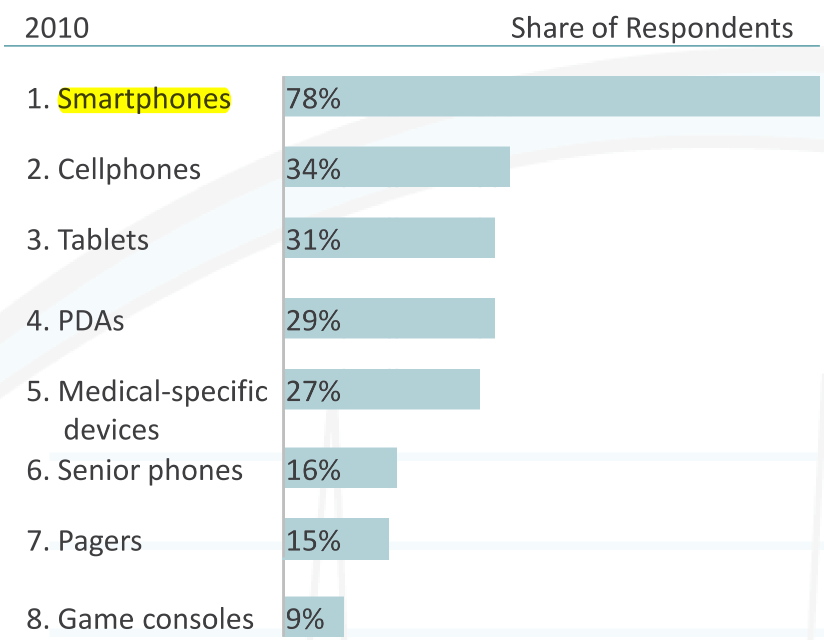
" In the future, even five years from now, we will have special different systems for distribution and acceptance of mHealth solutions."

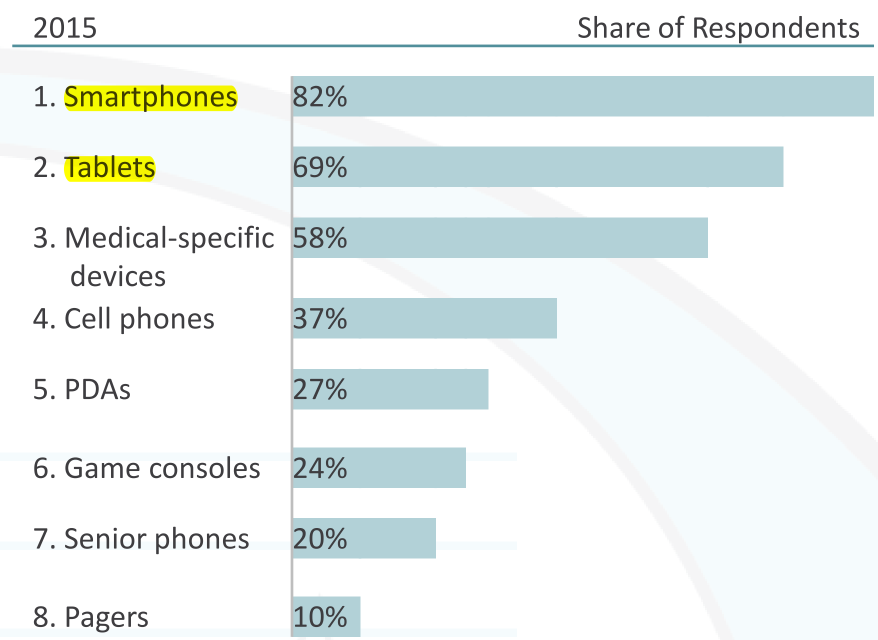
" I see doctors including apps into their therapies to improve health outcomes but also to differentiate."

* Hospitals, pharmacies, and physicians would recommend or provide mHealth solutions when patients come in for treatment.

Smartphones will offer the highest business potential for mHealth

What devices offer the best business opportunities for mHealth as of today and in 5 years time?





" There will be a very large migration "to the middle" between smartphones and tablets. The lines will be blurred and there will be the "real" device that people use for healthcare: a small tablet; bigger than today's smartphones, smaller than mainstream tablets like the iPad."

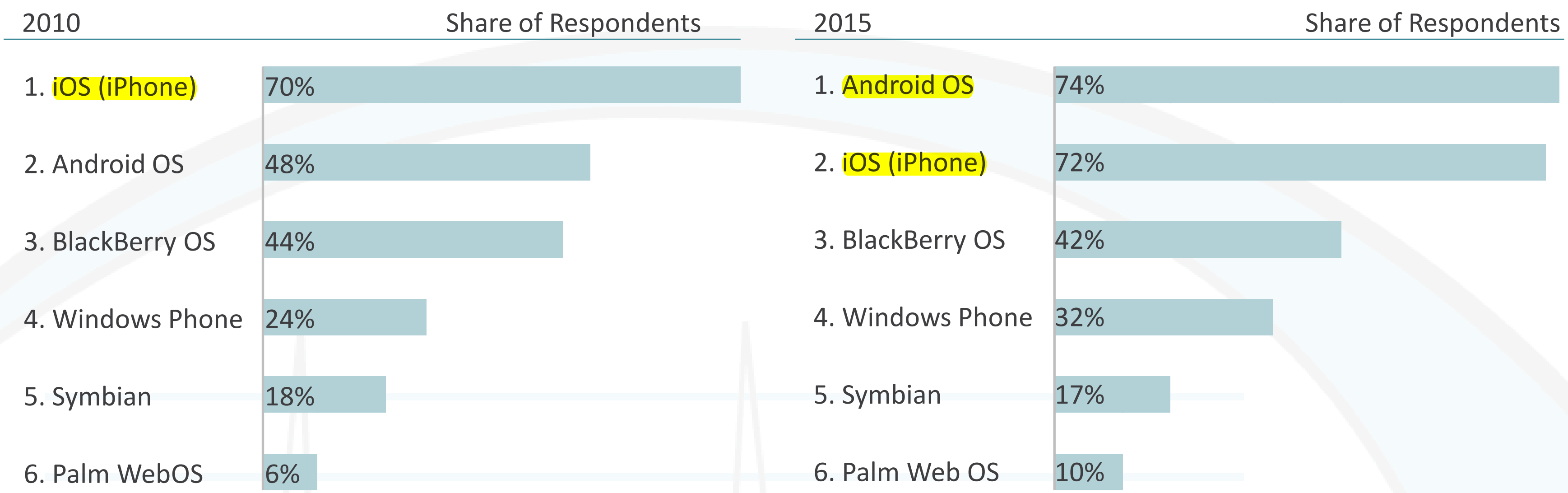
" We will be able to unify our communications across multi modalities - web, mobile, other media - a single device will have the ability to have multiple personas."

" Not sure smartphones will really pick up since they are too complicated to use for the target population. Specific easy to use, non-intrusive devices will win in my opinion."

" mHealth is just another mode - it could be a better mode, but the true solution needs to use all types of communications from face to face to virtual healthcare delivery via a smart phone."

Android and iOS will be the preferred mobile platforms for mHealth solutions

What smartphone platforms offer the best business opportunities for mHealth as of today and in 5 years time?



“ Apps have a place, but it mainly as a portal to cloud solutions, the real players in this space will be cloud service companies.”

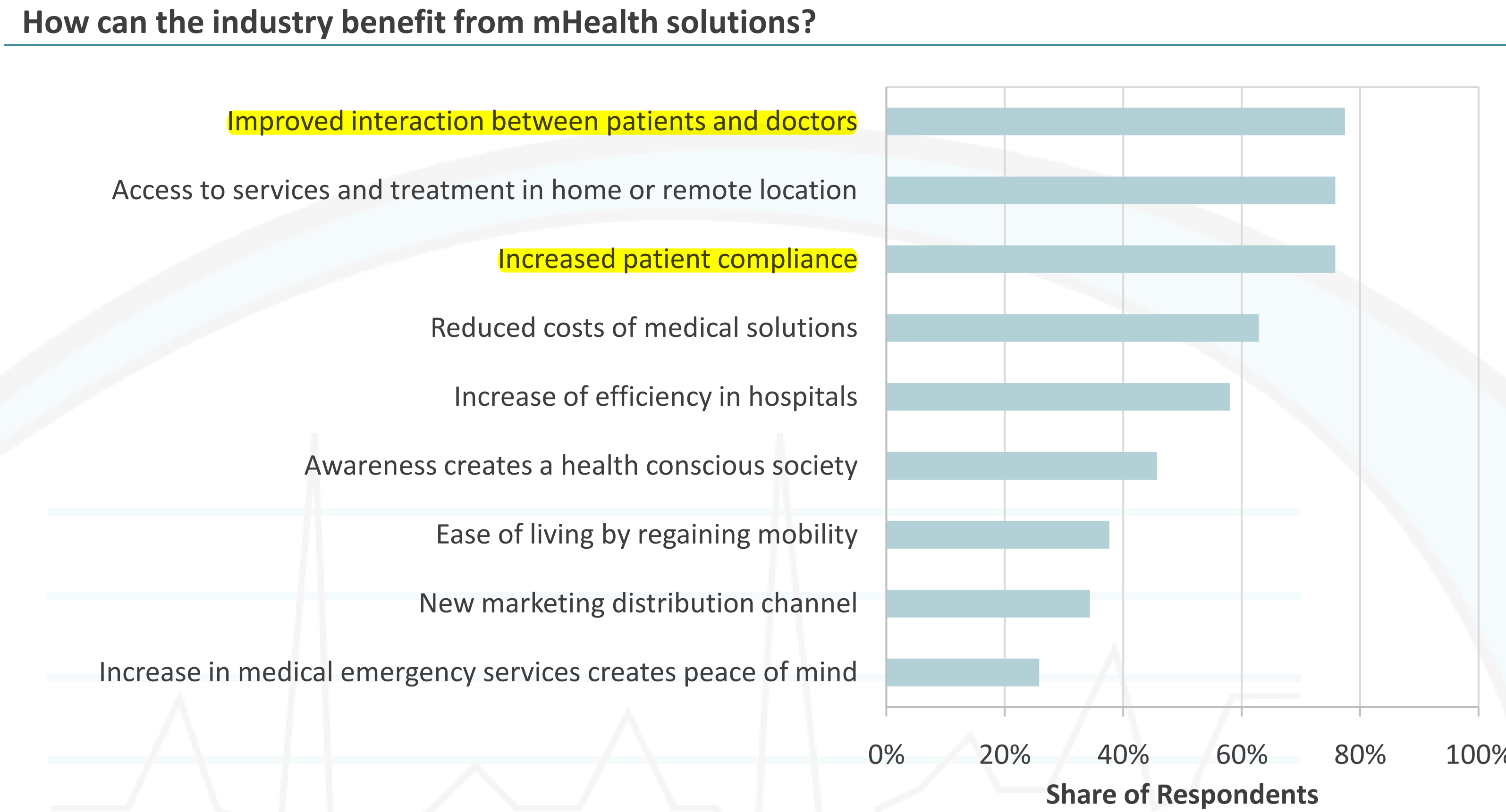
“ Apps will live in the cloud - we will carry dumb bricks that we load with smart applications - OS for phone/or mobile device (pad, tablet some new thing we have not seen yet) should be standardized at some point.”

“ There is too much focus on Smartphone Apps and not Web Apps. Web Apps will be the future!”

“ No good platforms as of now. They all have serious limits related to connectivity to external data collection devices.”

“ A more comprehensive approach will be necessary to assure sustainability of mHealth applications. Even though individual apps can be very fancy and useful they do not solve problems in the long term. In the long run they will have to be part of more integrated systems.”

mHealth apps are seen as tools to improve communication between patients and HCPs* and amongst HCPs



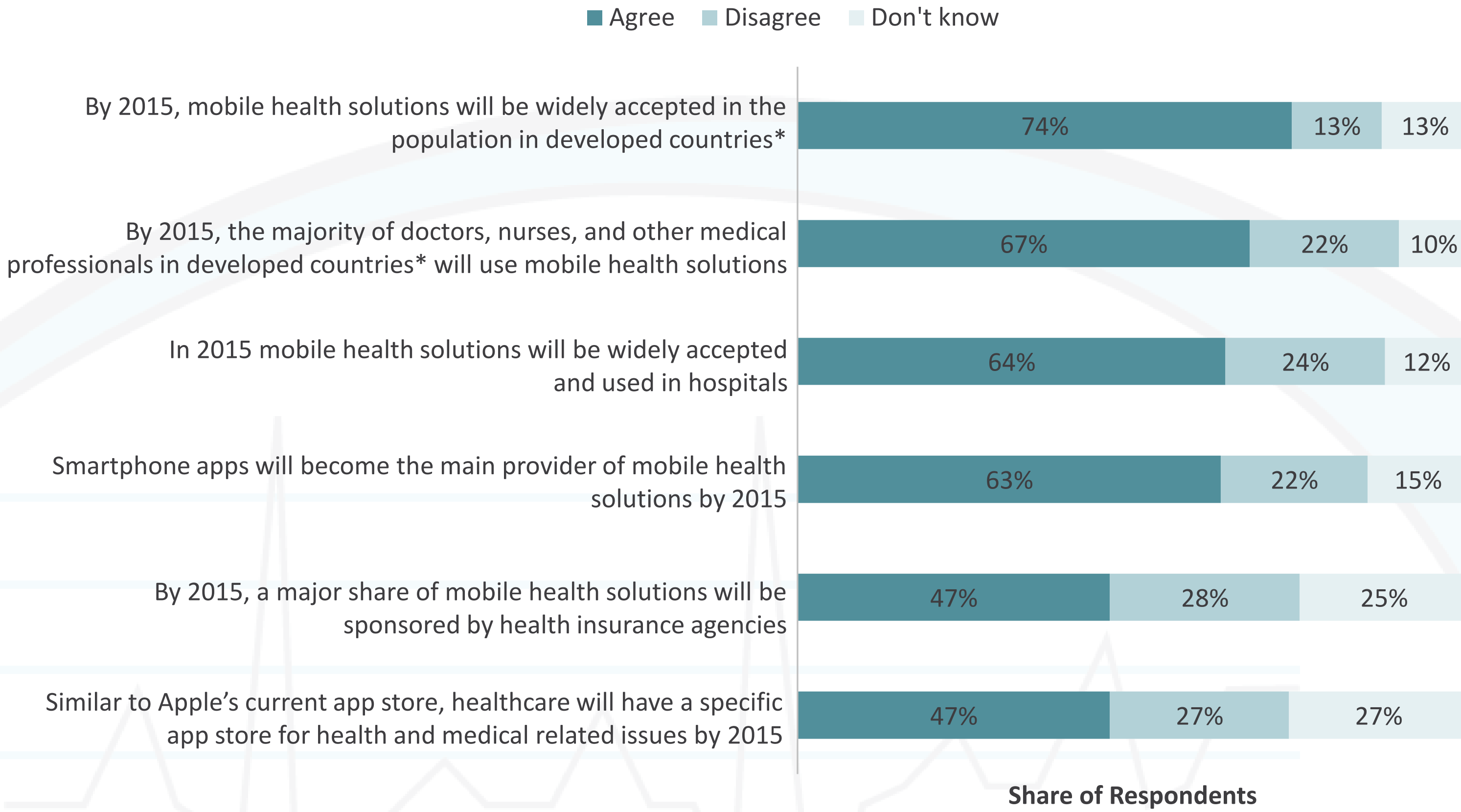
" mHealth will assist in building healthier communications between patients and providers. "

" It [mHealth] helps providers to improve their service delivery, resulting in better health and greater satisfaction in their patients. The end result will be reduced healthcare costs, increased productivity and overall happiness in human lives."

* HCPs: Healthcare professionals

The majority of participants forecast a breakthrough of mHealth in the next five years

Please tell us your opinion about the following hypotheses:



" An emerging market for mHealth could be India. Even though it is still a developing economy, it is a country where acceptance to technology is very high due to a large population in the age group of 20 to 40 years."

" Healthcare is 15 years behind most other industries - we use robots to perform sophisticated tasks and then we write about the results on paper !"

* North America, Europe, Australia, Japan, South Korea, New Zealand (IMF definition).

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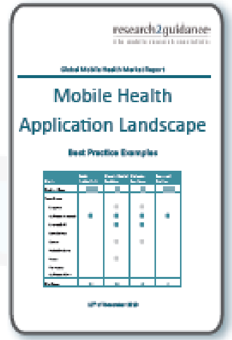

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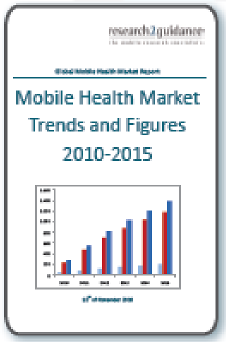

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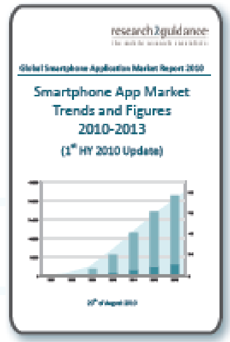

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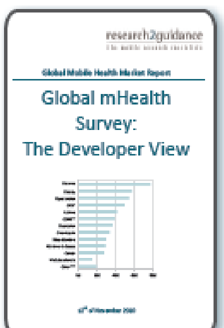

Global mHealth Developer Survey

Benefit from the first-hand insights of 235 mHealth app developer worldwide. Get their views on which areas offer the highest business potentials for mHealth, the best mobile mHealth platforms, barriers and trends and much more.

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mHealth App Market Drivers 2010 -2015

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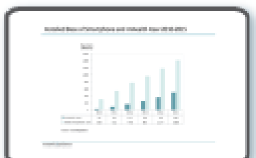
Price Comparison mHealth vs. Total App



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App Store Race (2000-2010)

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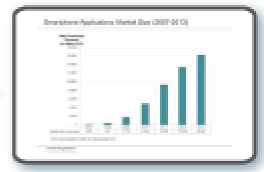
Smartphone App Market Size (2007-2013)



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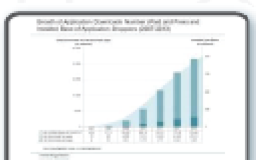

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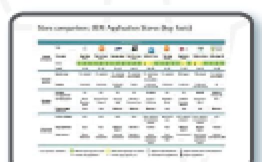
App Store Comparison Tables (8 Slides)



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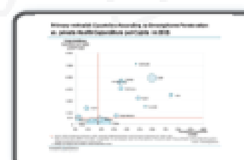
mHealth Market Potential per Country 2015



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