

Global mHealth Developer Survey

research2guidance
the mobile research specialists

Summary of Survey Results

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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 the second half of 2011 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.

Note: This document summarizes the information gathered during the survey. It does not draw any conclusions or provide recommendations. It includes comments and opinions of survey participants.

Survey details

Objectives:

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

Time:

- The survey was conducted in the second half of 2011

Method:

- Online questionnaire

Participants:

- 377 companies and individuals involved in mobile health market

Reach:

- Global

Survey participants include (total 377 respondents)

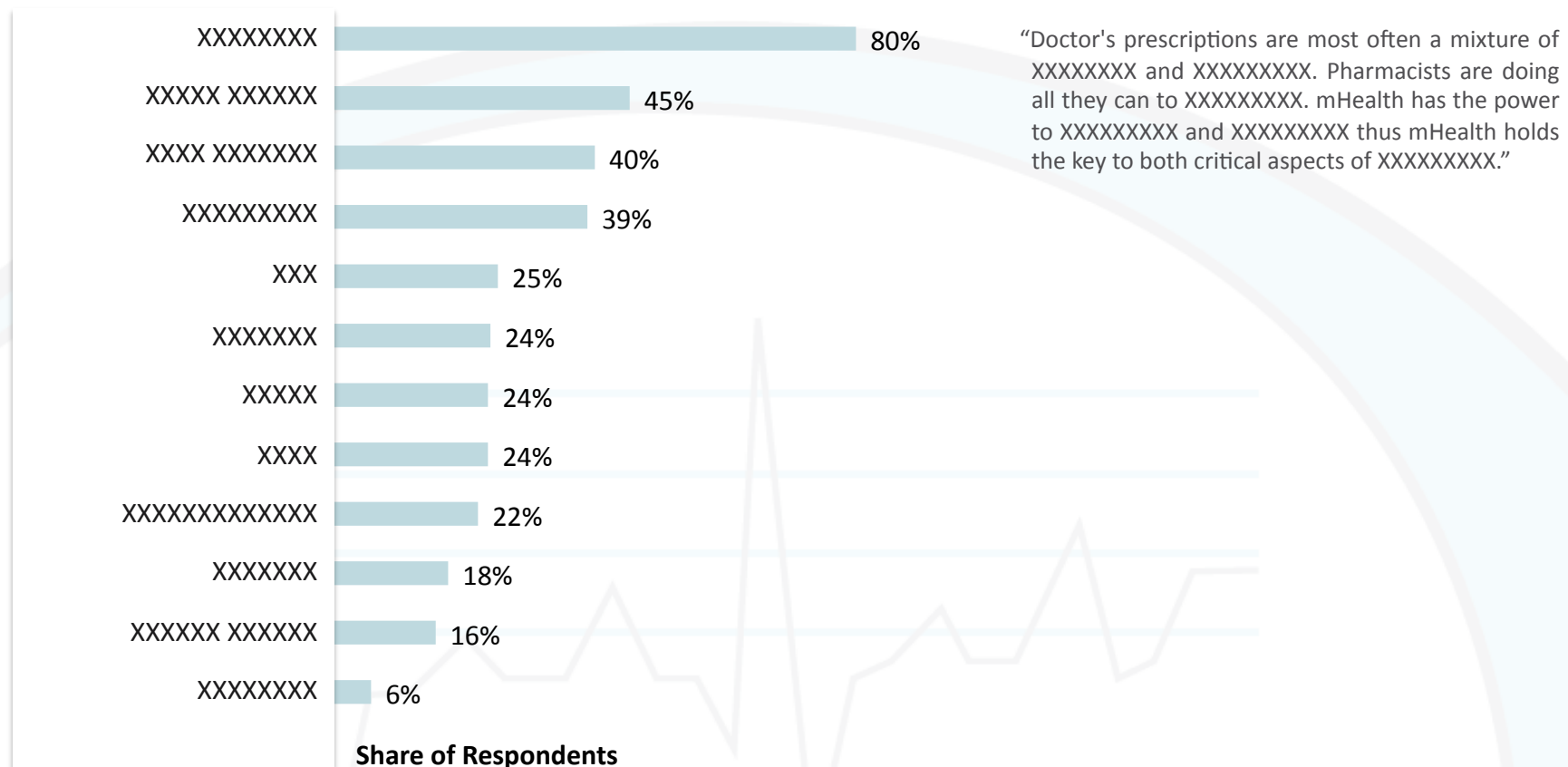
28b Limited	Comstrand	Hospital Gift Shop, Inc.	MedicApp Corp Ltd	Publicis Life Brands
Aalborg University	Cooldesign Agency	Huawei	Medimooov.com	Publicis Life Brands Resolute
Aastrom Biosciences, Inc	CooperVision	Humana	Melbourne Health	Ranbaxy
Able Eye Device Co., Ltd	CoreApp	ICW	Merck	Robbins Interactive
Accenture	CPMG	iLabs Medical	Merck Serono	Roche Pakistan Limited
Across Health	CTS	IMAGE Information Systems Europe Ltd.	mHealth Evolve	Rock Health
ADL	CVS/Caremark MinuteClinic	Imaxdi	Mobidarm	Rosetta Marketing
Advanced Medical Solutions plc	Dakota State University	IMI-Health AG	mobile health expo	RTC North Ltd
Aetna	DCIS	IMS Health	Mobile PRM	Saint Joseph Health System
Alcon Inc	Devicix	Informa	Mobile Solutions Company	sal hospital
allan eades & associates p/l	Diya IT Solutions	Innovate Vertical Solutions	Modern Health Talk	Scottish Healthcare
Allergan	DLS HEALTHCARE CONSULTING, LLC	Institute of Electronic Business	Mole Productions	Sensei, Inc
Altys Technology (Pty) Ltd	Drapin & Co.	Intelecare Ventures, LLC	Moleac Pet. Ltd.	Shenzhen Comen Medical Instruments
Anakena Solutions	eczacibasi	Intellego Health Management	MPI	Sky International
Ansell	E-Health Media	Resourcing	MSD	Smart Online
Anson Group	Eyelab S.r.l.	Intuitive Health	NATO Training Mission	Smiths Medical
ANT+ Wireless	Elsevier	iPLATO Healthcare	Neseco	Sofomo Embedded Solutions Pvt Ltd
App diagnosis AB	Empathy Lab	IRWAA LLC	Neural Diagnostics Pty Ltd	lifeplot.in
Apple Inc.	Engage	Itelogy Partners	Nevrocorp	Sonic Healthcare
AT&T	Ericsson Nikola Tesla	Yankee Group	New Leaf Ventures	South West Yorkshire NHS
Atos IT Solutions and Services GmbH	ESI	Johnson & Johnson	NHS West Midlands	Spyder Digital Research Inc
Axicare	Essential Research	Kairos Future	NIH	St Jude Medical
Bahia Software	Essilor USA	Kaiser Permanente	NIHP Inc.	Strategy Analytics
Bayer	EveryFit	Kaitensoft- IMS Partner	Nonin Medical	Stryker
Baxter Healthcare	Executive Impact Group	kalbe farma, tbk	NowPos M-Solutions	Tactio Software
Bdigital	Fitness Fulfillment	Katholisches Klinikum Bochum	Nutricia Advanced Medical Nutrition	Tech Data
Blue Highway, Inc.	FLA	KCI	Nutricia Ltd (Danone)	Technikum Wien
Boehringer Ingelheim	Flaxworks	KePRO	Oakley Medical Practice	TeleThrive
Business Republic	FutureHealth.com.au	Lavandoo Mobile Solutions GmbH	OHSU	TELUS
Carefusion	GE Healthcare	LifeQube	Optasia Medical	Teva
CareFusion	GeHS	Lifesense	OptiMedis AG	TILab
Castrosin	Gill Creative Resources	LifeWIRE CORP	OptumInsigh	UCB
Catalent Pharma Solutions	GMHP	Magyar Telekom	Ozan Batigun	UNC Hospital
Celesio AG	H2Online	Mayo Clinic	Pacifica Senior Living in San Leandro	University of Auckland
Celgene Corporation	H3 System, Co., Ltd.	Mango Informatics P.L.	PAREXEL	University of Otago
Cellnovo	happtique, inc.	Marylhurst University	PatientKeeper, Inc.	USAMRMC/TATRC
CHW	Health Interactions	Matryx Group	Philips	Vasterbotten County Council
CINTERION, a Gemalto company	Health Ministry	Maxim Healthcare Services	Phoenix Consulting MLJ	Vestre Viken HF
Cipla Ltd.	Health over IP (HoIP)	McKesson	Planet Hobu	Virgin Active (Pty)
Cognovant, Inc.	Hewlett Packard	mDiagnostica	Planet Siol.net	Viropharma
Coloplast do Brasil Ltda.	Hytec	Medco Health Solutions	PMD Exports, Inc.	vivmed
Commonwealth Management Services	HMRC	MEDgle	Praetorian Services Plc	WEB on The Web
Complete Digital	Hospira	Medical Connectivity Consulting	PT KalbeFarma	WellDoc
				WHO
				..and single experts

Key take aways

- XXXXXX is seen as the therapeutic area with highest business potential
- Today XXXXXXXXXX and XXXXXXXXXX are the main target groups for mHealth solutions
- Mobile health solutions for XXXXXXXXXX and XXXXXXXXXX differ a lot in their business potential
- Both, tablets and smartphones, will have a place in market but XXXXXXXXXX
- Participants envision XXXXXXXXXX of mHealth solutions in 2016
- Patients, app developers and agencies are seen as XXXXXXXXXX
- XXXXXXXXXX is seen as the main driver for mHealth
- XXXXXXXXXX, XXXXXXXXXX and XXXXXXXXXX are the main barriers facing mHealth
- XXXXXXXXXX will remain one of main XXXXXXXXXX for mHealth solutions
- XXXXXXXXXX will offer the highest business potential for mHealth
- XXXXXXXXXX will be the preferred mobile platforms for mHealth solutions
- mHealth apps are seen as tools to XXXXXXXXXX
- The majority of participants forecast a break through of XXXXXXXXXX

XXXXXXX is seen as the therapeutic area with highest business potential

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

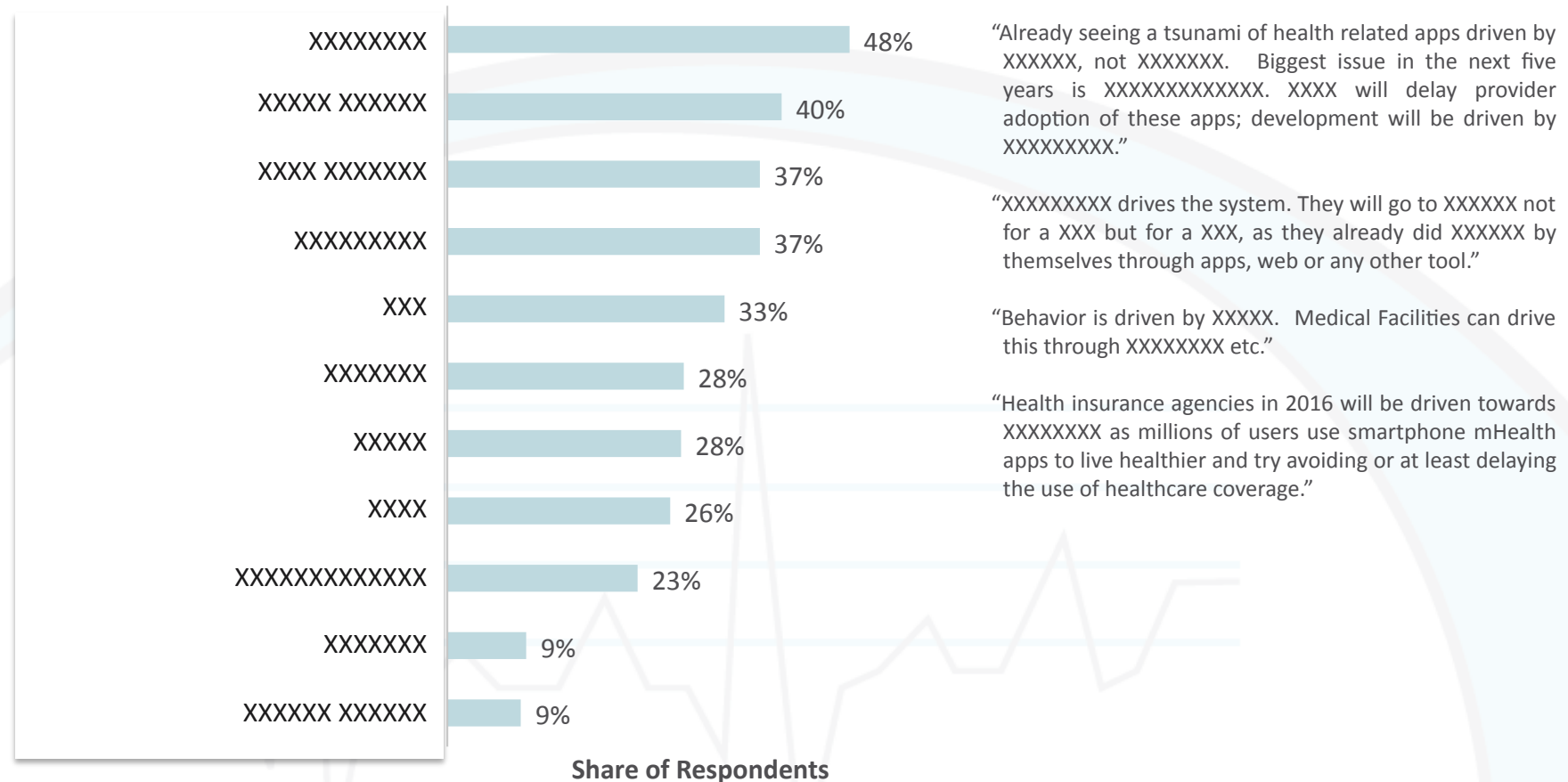


* XXXXXXXXXXXXXXXX

** XXXXXXXXXXXXXXXX.

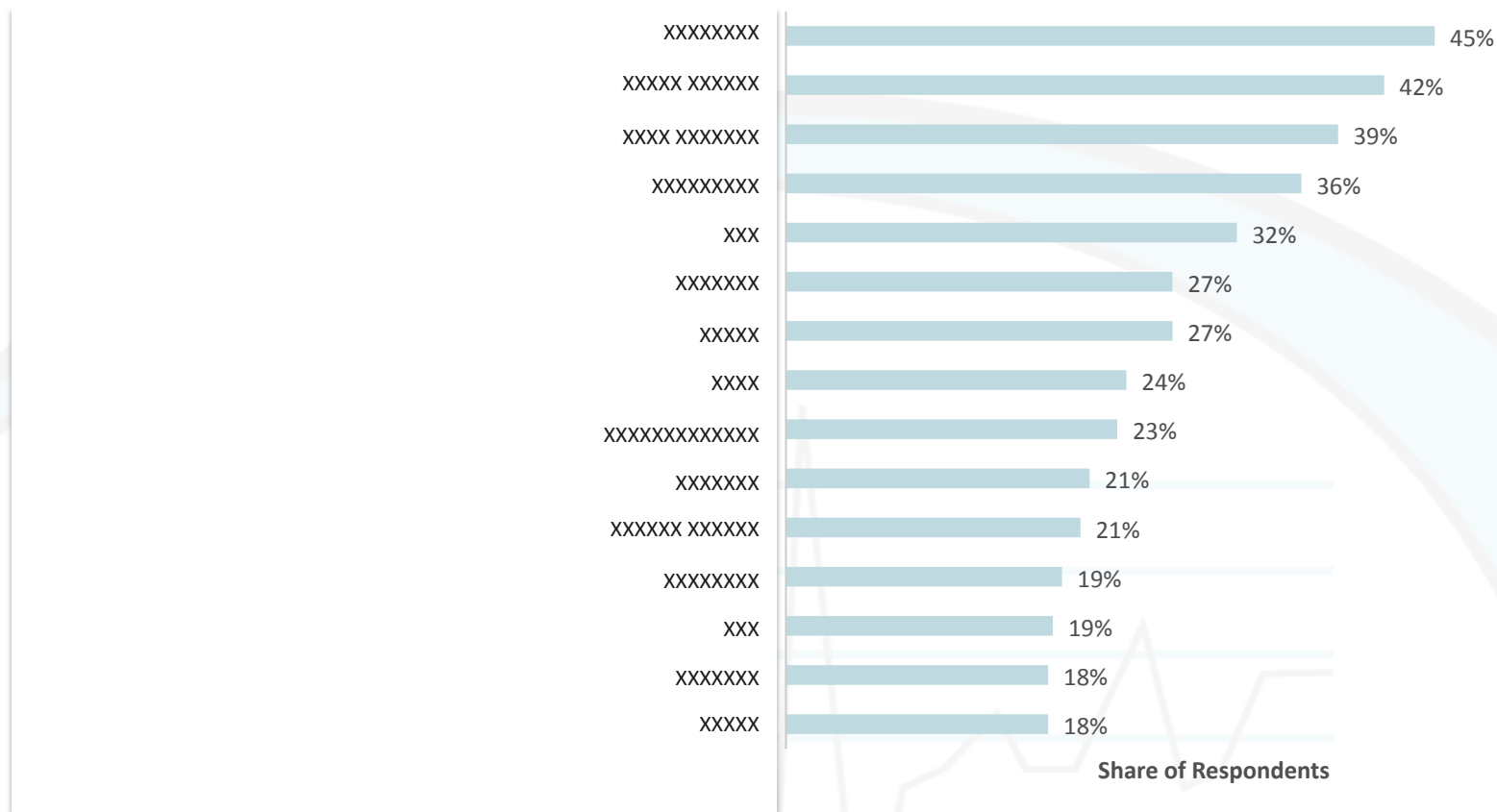
XXXXXX, XXXXXXXXX and XXXXXX are seen as main players in the market

Which of the following stakeholders are going to drive the mHealth market over the next 5 years?



XXXXXXXXXXXX is seen as the main driver for mHealth

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



"The future of healthcare will not be in XXXXXXXXXXXX, but will be in XXXXXXXXXXXX. <...> This will be dependent on XXXXXXXX, XXXXXXXX and XXXXXXXX."

"The mHealth environment has grown rapidly the last two years. It's great that the XXXXX and XXXXXXXXXXXX have been adopted from the XXXXXXXX. One year ago, the mHealth discussions was funny to follow. No the XXXXXXXX are brought into the discussions, and that's a turning point."

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