



# mHealth App Performance Benchmarking

7<sup>th</sup> of August 2013

### **Preface**

research2guidance is a specialist research organization focusing on the mobile app market and its developments. We provide business leaders with market facts and guidance for a better understanding of important trends that shaping mobile markets today.

This report concentrates on the major mHealth app markets in the USA, Germany, UK, Brazil and Japan. It benchmarks the performance of the most successful mobile health apps available for iPhone, iPad and Android phones.

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E-mail: info@research2quidance.com

Phone: +49 30 609 893 360

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# This report analyses the performance of 795 successful mHealth apps in USA, Germany, Brazil, Japan, and UK



**Downloads:** Average monthly and total lifetime downloads for free and paid apps



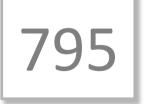
**Platform:** mHealth apps for iPhone, iPad and Android phones



**Pricing:** Pricing of top 10 paid mHealth apps



mHealth app categories:
Apps in the Health & Fitness
and Medical category

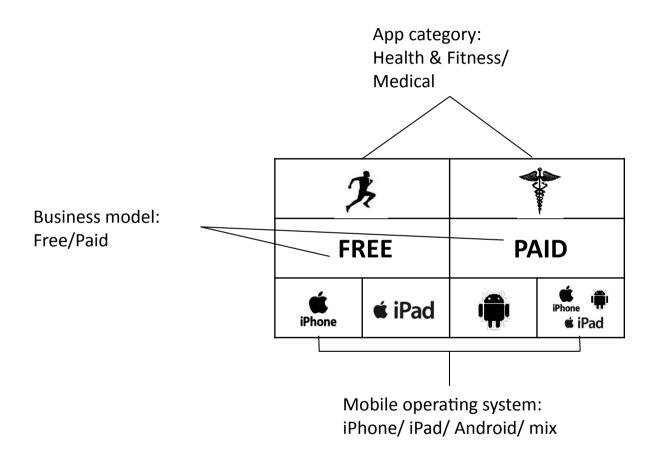


Number of apps:
Benchmarking including
795 successful mHealth
apps



mHealth apps: Apps that have been listed in the top 10 from Dec. '12 to Feb '13

# The content symbol tracker helps with orientation in the report



### **Summary**

There is a lot of hype around the market for mobile health applications. The possibilities of improving patients' outcome and reduce health care cost seems huge. App publishers on the other hand report serious problems to generate enough revenues to finance their ideas.

This report analyzes the performance of the most successful mHealth apps in 5 different countries. Thus potential app publishers will gain a better understanding of the current market's business opportunities.

There are significant differences in how many downloads or what revenues an mHealth app can generate in different countries, mobile platforms, app categories and business models.

The US market offers the biggest market potential for successful mHealth apps throughout all platforms. The market potential for other countries depends highly on other than regional factors. For example, the chances to generate reach with a Health&Fitness app on Android is higher in the UK than in Germany, Japan, Brazil. Or: Japanese paid iPad apps of the Health&Fitness and Medical section generate almost as many downloads as top 10 apps in the USA.

There are only a few app categories like Drug Information, Diet and Exercise apps that are equally representative amongst the top 10 ranks in all countries. Each country has their own structures and preferences.

## **Summary (cont.)**

The chances to publish a Health&Fitness app that will be successful on iPhone, iPad or Android is much higher than an app for the Medical category – throughout all countries.

The US app market shows the highest number of apps that are also successful on a second and third platform. The Japanese app market is the most difficult market for successful multiplatform publishing.

The average lifetime of a successful mHealth app varies between countries. Free Health&Fitness apps in the US have been in the market for 39 months on average, whereas free Medical apps in Japan only count 10 months on average.

### Methodology:

This benchmarking report includes the 795 most successful apps of the Health&Fitness and Medical app categories. The analysis was conducted between Dec. 2012 and Feb. 2013.

The report compares the mHealth app performance in the USA, Germany, UK, Brazil and Japan. In summary the report provides a detailed performance benchmarking between countries as well provides details on country level.

Each country section includes: Category benchmarking (Health&Fitness and Medical), business model benchmarking (free and paid), app lifetime benchmarking, app subcategory distribution benchmarking and multi-platform publishing benchmarking.

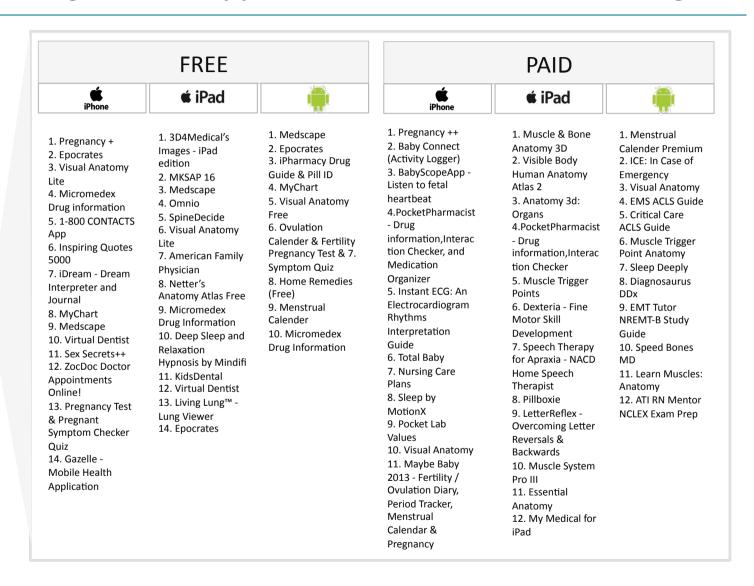


Top 10 Health &Fitness



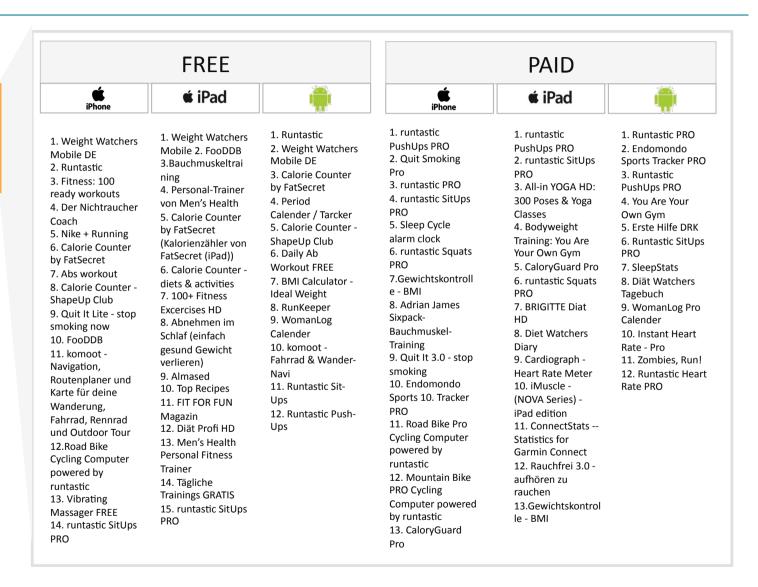


**Top 10 Medical** 



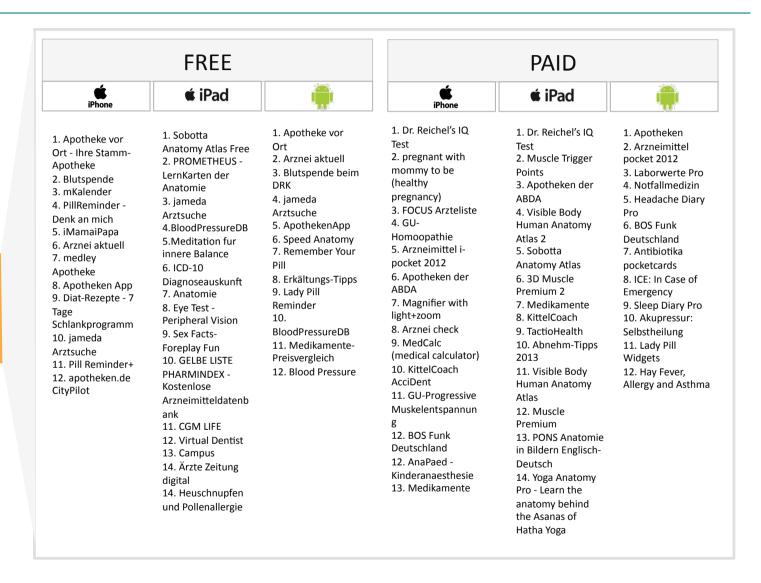


Top 10 Health &Fitness



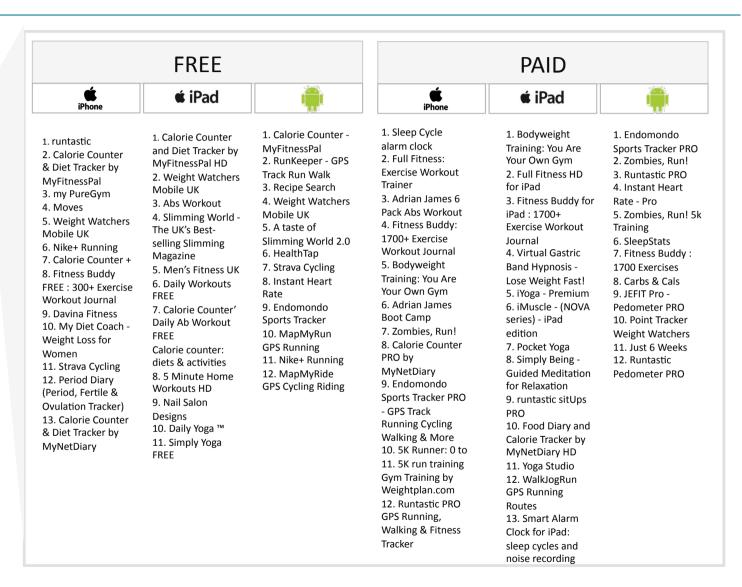


**Top 10 Medical** 



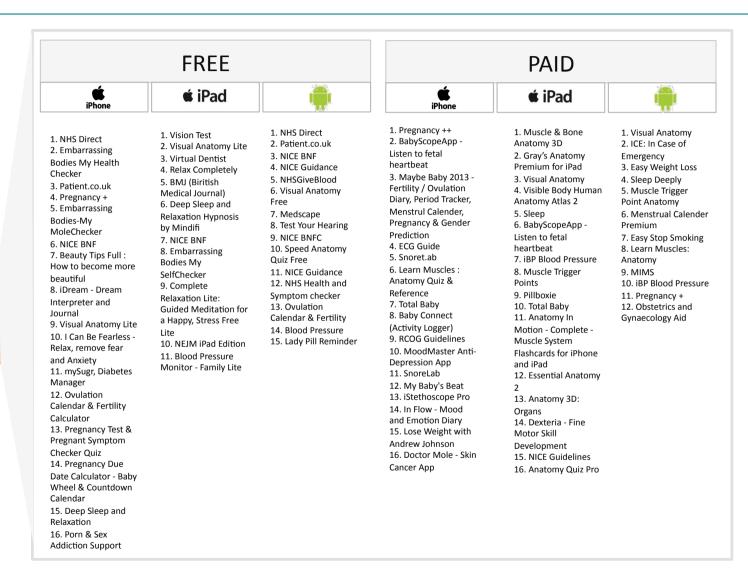


Top 10 Health &Fitness





**Top 10 Medical** 



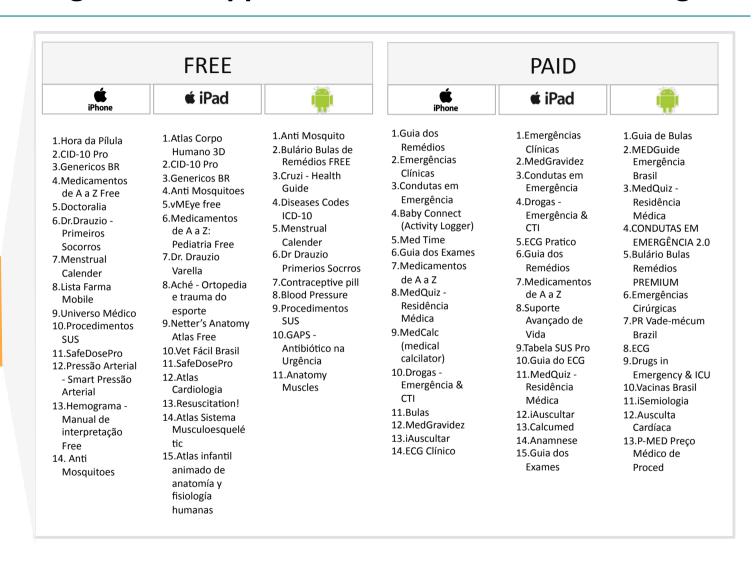


Top 10 Health &Fitness



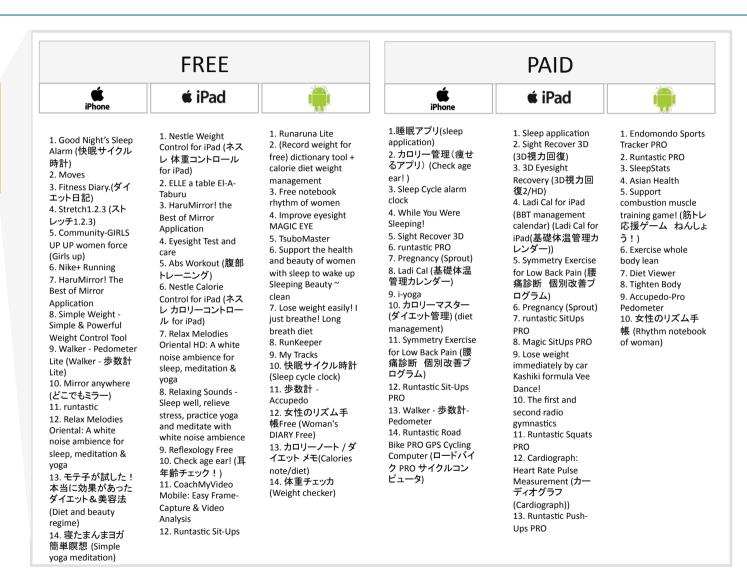


Top 10 Medical





Top 10 Health &Fitness





**Top 10 Medical** 

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# The content is presented in graphical style

Package content at a glance (extract)



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### Research2guidance mHealth competence

- research2guidance is monitoring the mHealth app market since 2007
- We have published more than 20 reports on the impact of mobile solutions on the health care industry
- The "Mobile health app market report" series is one of the most cited report in the industry
- Our reports are being used by key players in the market to support their mHealth strategy
- We provide global mHealth market estimate as well as country analysis
- Our consultants helped companies from the health care and mobile industry to develop their mHealth strategy

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