

Global mHealth Developer Survey

research2guidance
the mobile research specialists

Whitepaper: Summary
of Survey Results
December, 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.

Note: This document summarizes the information gathered during the survey. 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 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

Survey participants include (total 231 respondents)

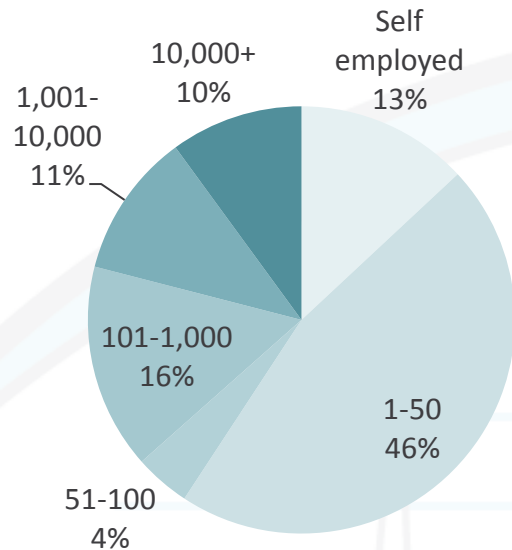
3C Strategy Limited	Complete Digital	IBM	National Institutes of Health	Sicap AG
Able Eye Device Co., Ltd	CONSORTIUM SANTE FRANCE	icom group	National Lab for Drug Control	Siemens AG
Abt Associates	Consulting	IKERLAN	NGN	Silverlink Communications
Active Medicine	CSC	iLabs Medical	NHS	SingTel
ACUMED	Darwin HC	IMS Health	Nokia	SM2 Surveillance Médicale
AEON Connected Health	DD Studio	Independent Management Consultant	Novo Nordisk	SMi Group
Allina	Deepak Foundation	Infisys Inc.	NowPos M Solutions	SML Associates Ltd
Altys Technology	Federal Department of Health (Australia)	INFORSON	Nurture Connect, Inc	Sofomo Embedded Solutions Pvt Ltd
Anexim Sales Consulting Pvt. Ltd.	Derdack	Innovacom	Omnicom	Solaris Health
ANT Wireless div of Dynastream	Desert Oasis HealthCare	Instera	Onlife Health, Inc.	Sorin Group
Innovations Inc.	Detecon	Intelecure, Inc.	Open Standard Solutions / medRF	Sotera Wireless
antwerpes ag	Diacoustic Medical Devices	iPLATO Healthcare	Papageorge General Hospital	Sprint
Apollo Health Street	DocInfoTech	iSensa	PatientenWielch GmbH	Sudler & Hennessey GmbH
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APS Healthcare, Inc	DreamWeavers InfoCom Pvt. Ltd.	Johns Hopkins Public Health	Peak Biomedical Ltd	Sureban
Arcimboldo	DRUGWRITE, LLC	Kaweah Delta District Health Care	Persistent Systems	Tactio Software
Astellas Pharma Canada	DunavNET	KM Group	PharmiWeb Solutions	Tata Teleservices Ltd
AT&T	Engage	KV IT consulting	Photon infotech	Telefónica I+D
Axicare	EPG Health Media	Leap of Faith Technologies, Inc	PI	TeleThrive
Bainton	Ericsson	LifeWIRE Corp	PMDEXP, Inc.	TELUS
Bayer Healthcare Diabetes Care	Fabulous PR	Logistics for Global Good	Powerwave Technologies Inc.	Text to Change
Bayer Schering Pharma	FC Busienss Intelligence	Magothy Group	Praetorian Services PLC Inc.	Triple Play Consulting
Barco	felix burda stiftung	Makina Corpus	Psion Teklogix Inc	TroyTyla
Beijing KellyMed Co.,Ltd.	Fishawack	mBricks AS	PSL Group	Turkcell
Benchmark Softec (P) Ltd	Fitness Fulfillment	McCann Healthcare	Razonon Health Innovations	UnitedHealth Group
binaryHealthCare	FORTH Institute of Computer Science	MDeSolutions	RegPoint Ltd	University of Bayreuth
BlinkMD VoiceSystems	Futurehealth	MEDgle	RememberItNow!	Urgent Care America
Blue Latitude	GDT: Group, LLC	Medical Connectivity Consulting	Ringroup	Verizon Wireless
Boehringer Ingelheim	GeoMed/FireKite	Medical Surveillance	Roche (Diagnostics Division)	Vestreviken
Bosch Healthcare	Globalpark AG	MedicApp Corp Ltd	RSi Communications	Viable Synergy
Cancer Care Ontario	GlaxoSmithKline	MediLogos	Say Communications	VitalmHealth
Card Guard	GSMA	MediMedia USA	saludnova	Voxiva
CareSpeak Communications	H3 System, Co., Ltd.	MedTech Media	Salveo	VU
Catholic Healthcare West	Health Innovation Partners LLC	MedWriter Limited	SapientNitro	Walker
CellTrak Technologies Inc.	Health Interactions	MHComm	SB Communications Group	WebDispatch.com
Cidway Security SA	Health IQ	mHealth-Mobile Solutions	Scoop Technologies	WellDoc
Clinovations, Inc.	Healthagen, LLC	Microx Solutions	Scottish Healthcare	Wellness & Health Innovation
CMC	Hiliary Critchley Consulting, LLC	Mobien Technologies Pvt. Ltd.	ScriptPad	What If
Cognizant Technology Solutions	HomeCare HomeBase	Mobile Flow	SegurCaixa Adeslas	Zorgbeheer
Colleen Shannon Medical Writing	Huawei	mobile zeitgeist	SENGEX, LLC	And single experts
com2health	Humana	MobileWellbeing Inc.	Serviceplan VITAL	
CoMetrica	Hungarian Telekom	Mobisante	Shivya Cosmoplast	

Summary

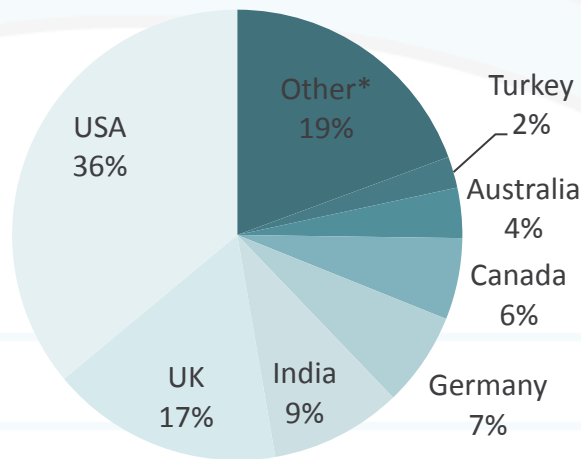
- The majority of participants forecast mHealth to break through in the next five years.
- Nearly 80% of respondents see diabetes as the therapeutic area with highest business potential.
- Today healthcare interested people and clinical doctors are the main target groups for mHealth solutions, as perceived 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 facing mHealth.
- 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

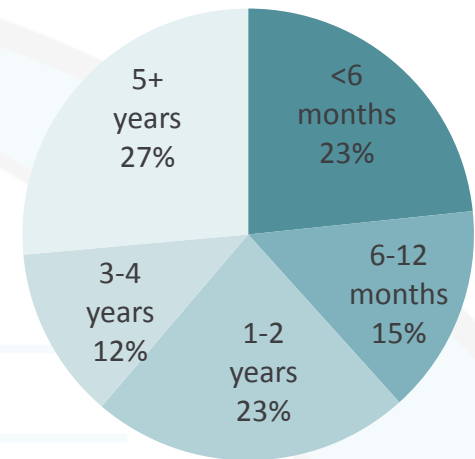
Participants by No. of employees



Participants by country



Company's experience in mHealth

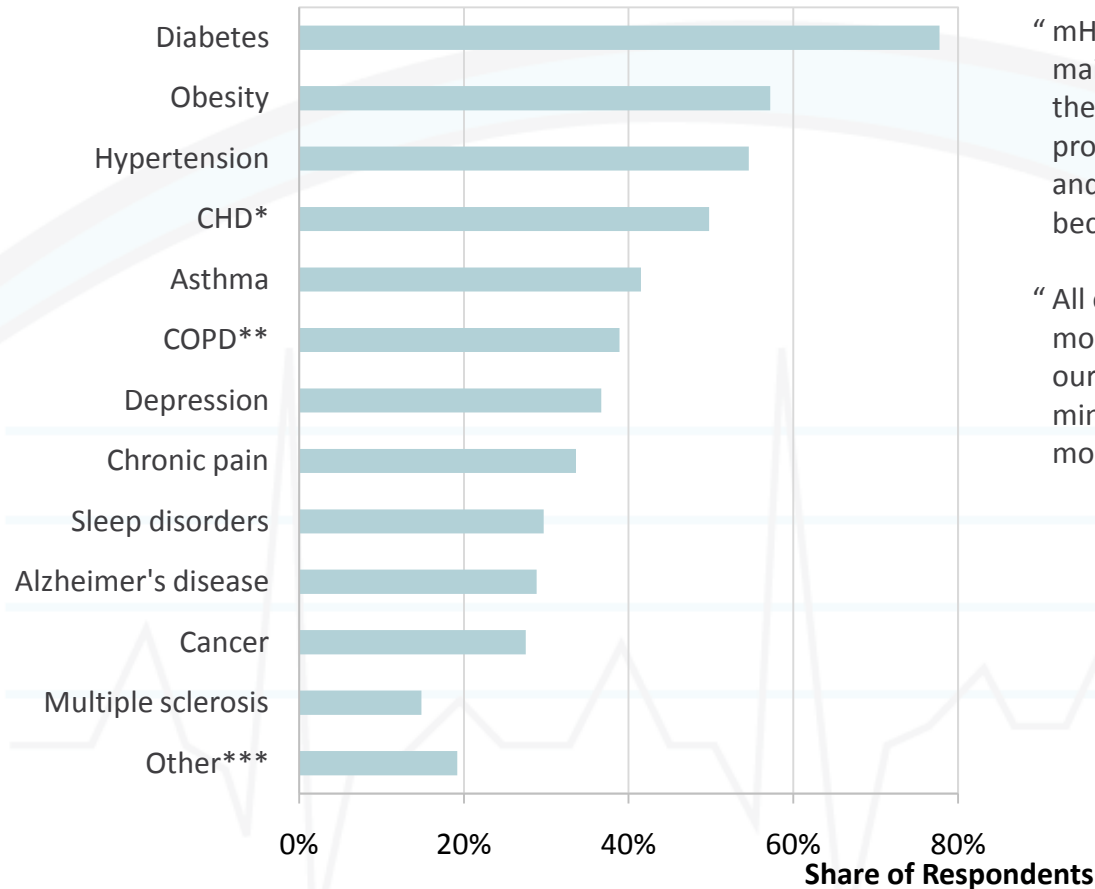


Ø 2.2 years

* 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

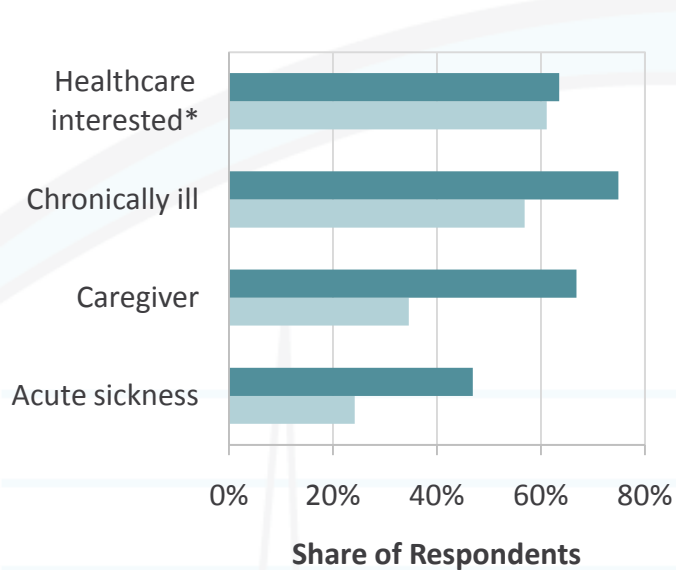
** COPD refers to chronic obstructive pulmonary disease.

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

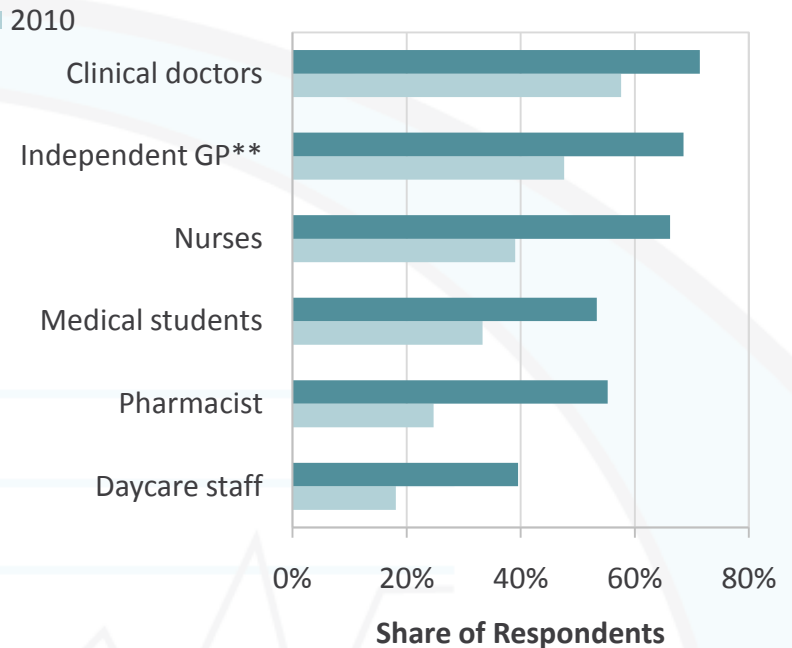
Today healthcare interested people and clinical doctors are the main target groups for mHealth solutions

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.”

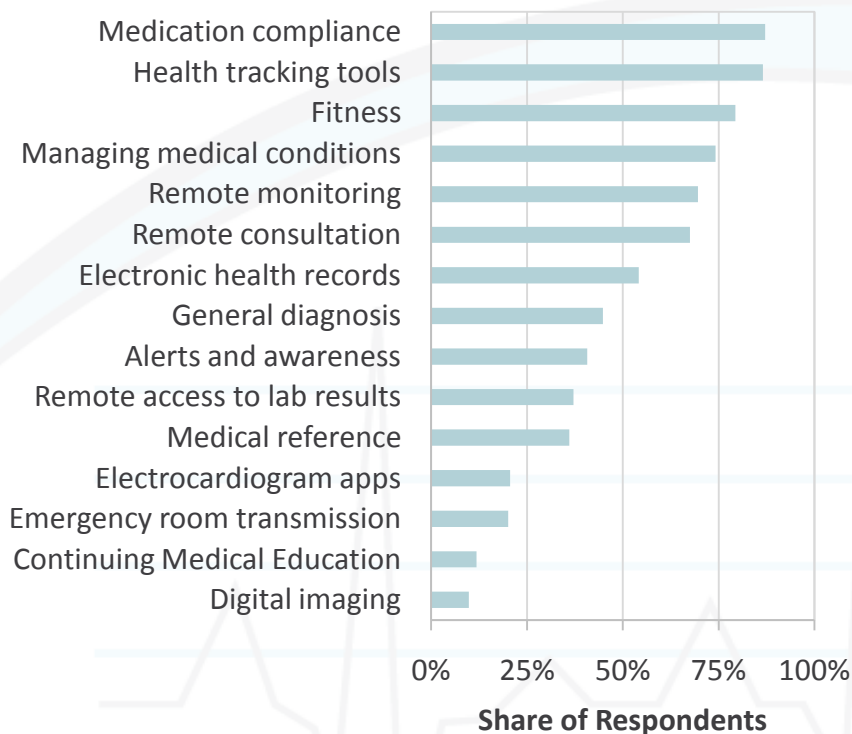
* Individuals that are highly interested in fitness, nutrition, and other health related issues.

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

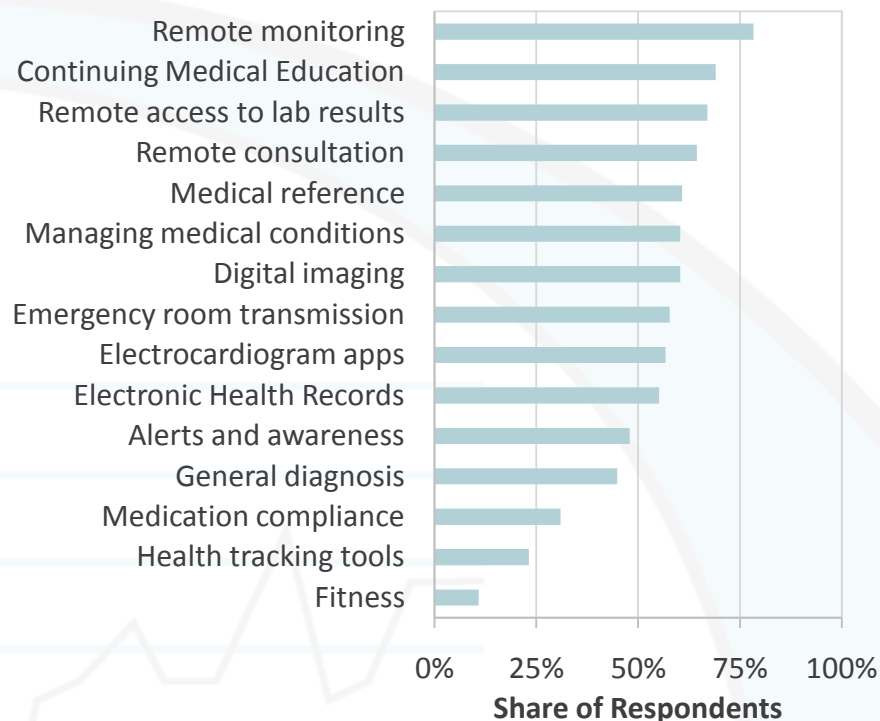
Mobile health solutions for patients and professionals differ a lot in their business potential

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.”

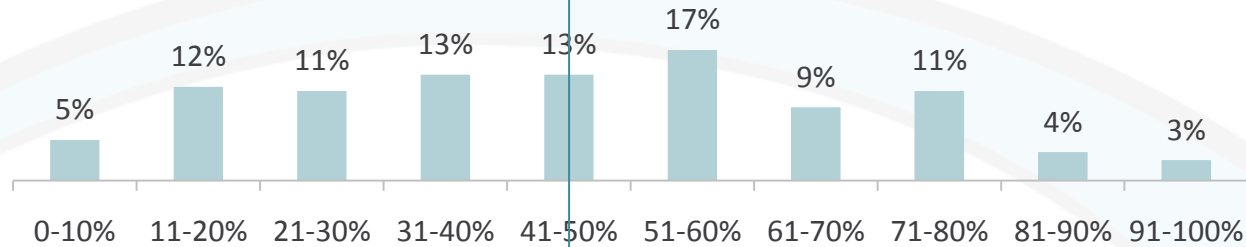
“A digital dialogue, centered around an individual patient and his 3D anatomical display, will be the future of virtual medical solutions.”

Participants envision significant acceptance of mHealth solutions in 2015

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

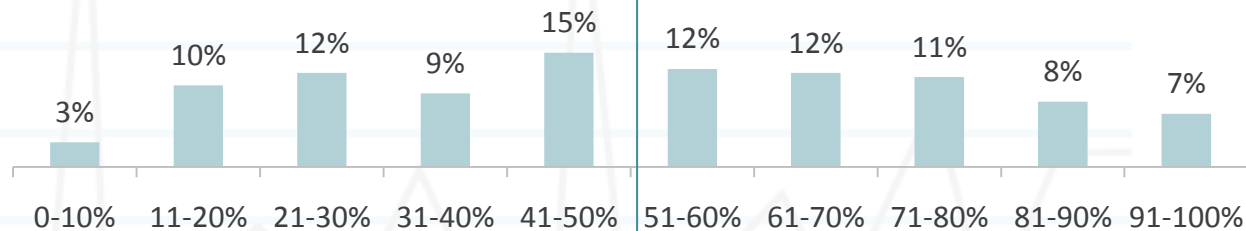
Patients

Ø 45%



Professionals

Ø 51%



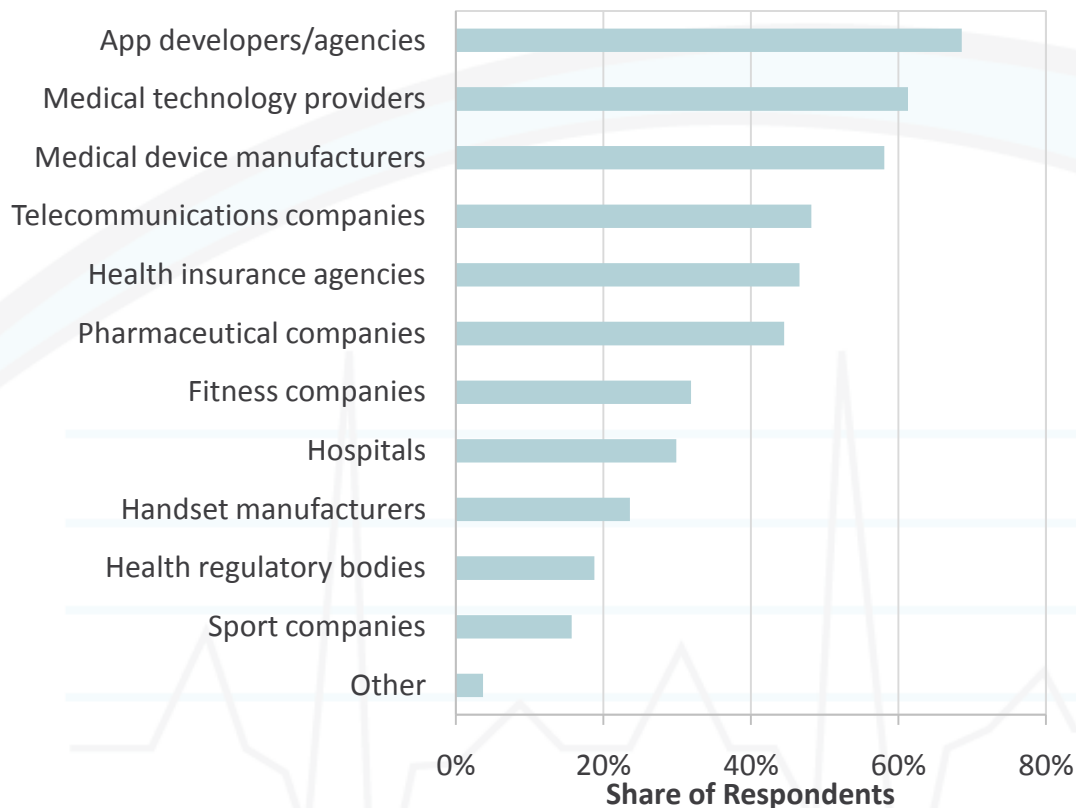
“It is well documented that the adoption of new clinical practices and technologies takes longer than 5 years. However, because healthcare is one of the global economy’s largest industries even a 10% adoption/change would be very meaningful.”

“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.”

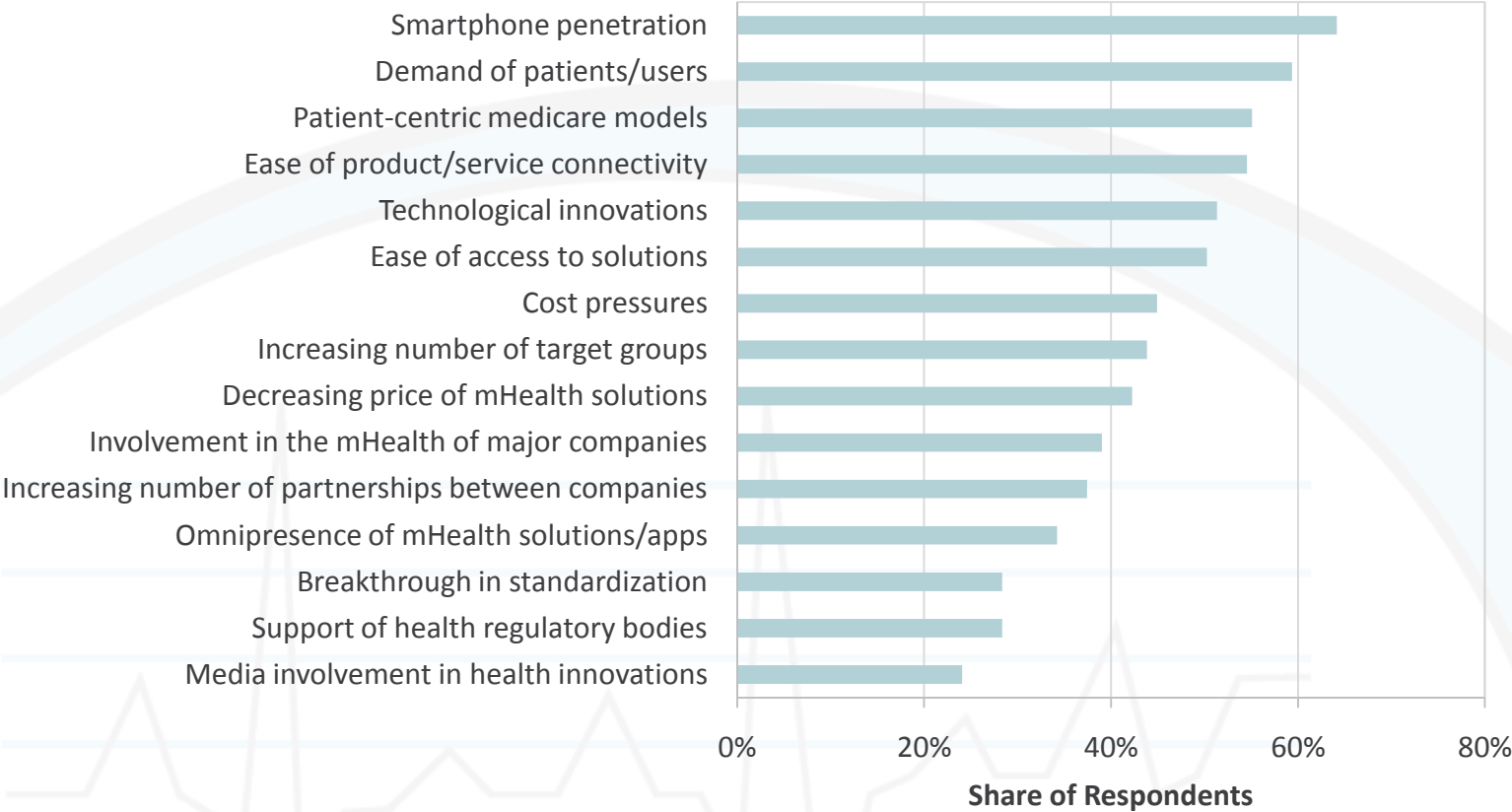
“The medical industry needs to work closely with the telecom industry, in order for mHealth applications to become a success.”

“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 facing 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

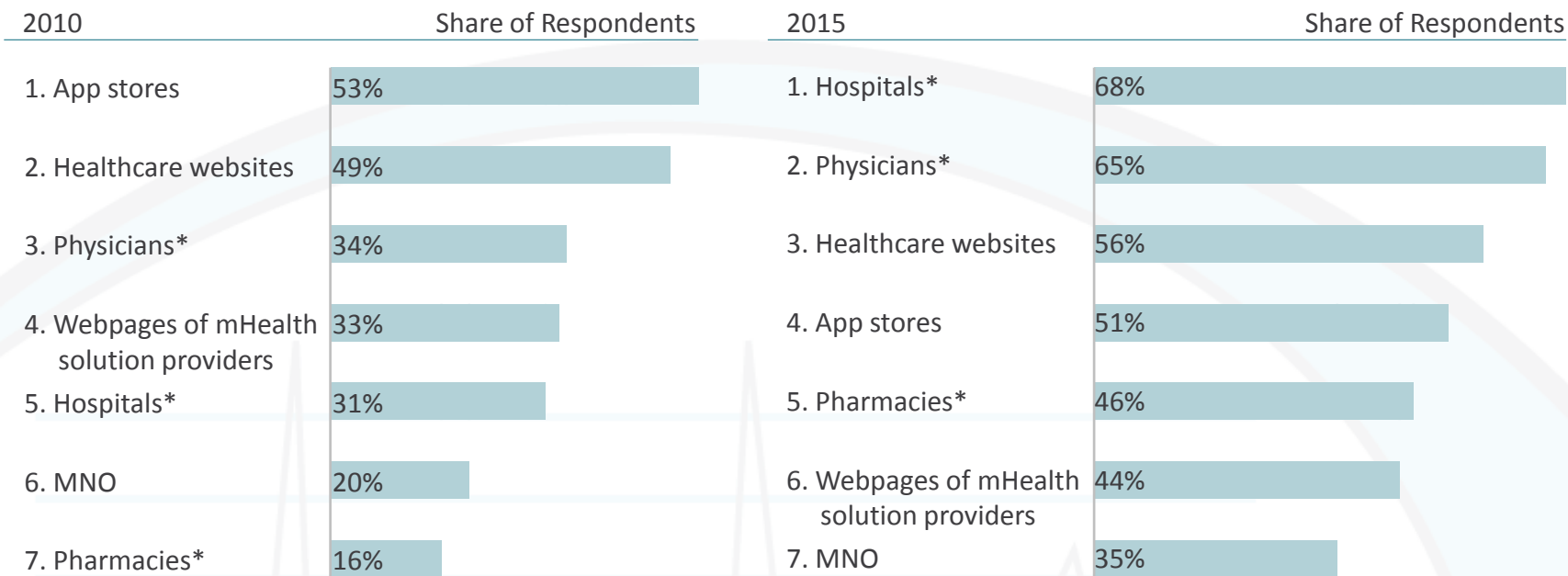
“One big problem is funding for innovative companies in the mHealth space. Everyone knows how huge this can be, but many VC firms and investment companies are scared to death of healthcare. They don't understand it and don't see the business model in supplying something that non-patients use (i.e. something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



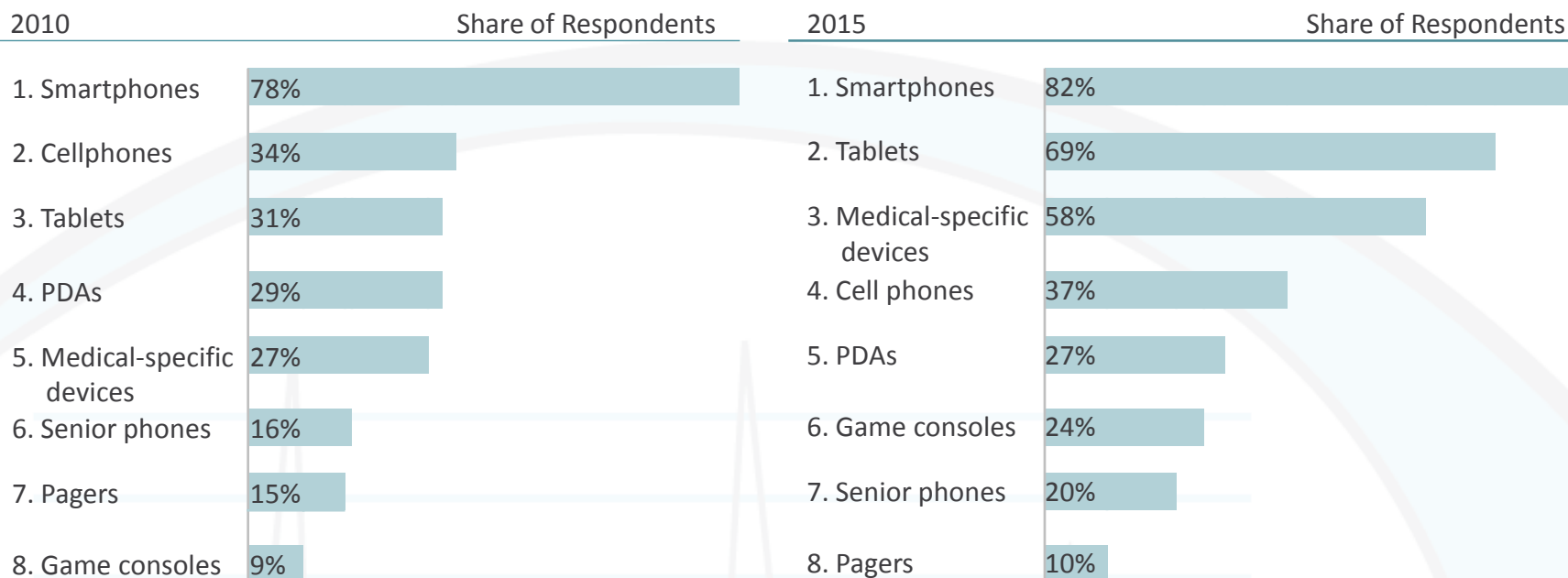
“ In the future, even five years from now, we will have special different systems for distribution and acceptance of mHealth solutions.”

“ 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.”

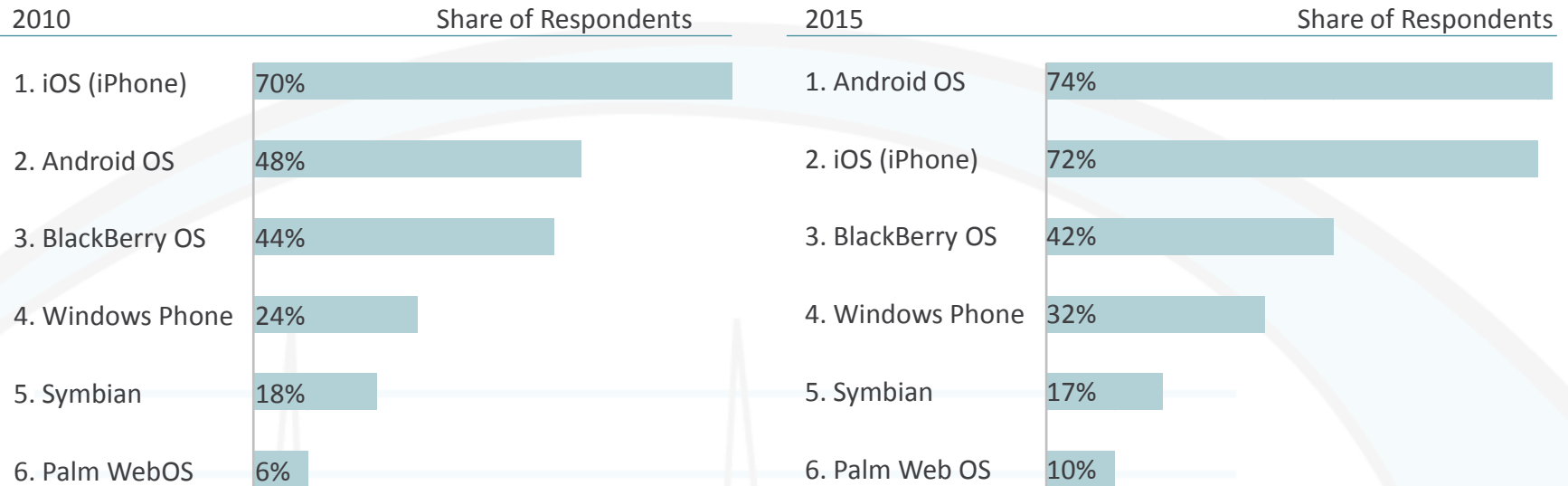
“ We will be able to unify our communications across multi modalities - web, mobile, other media - a single device will have the ability to have multiple personas.”

“ 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.”

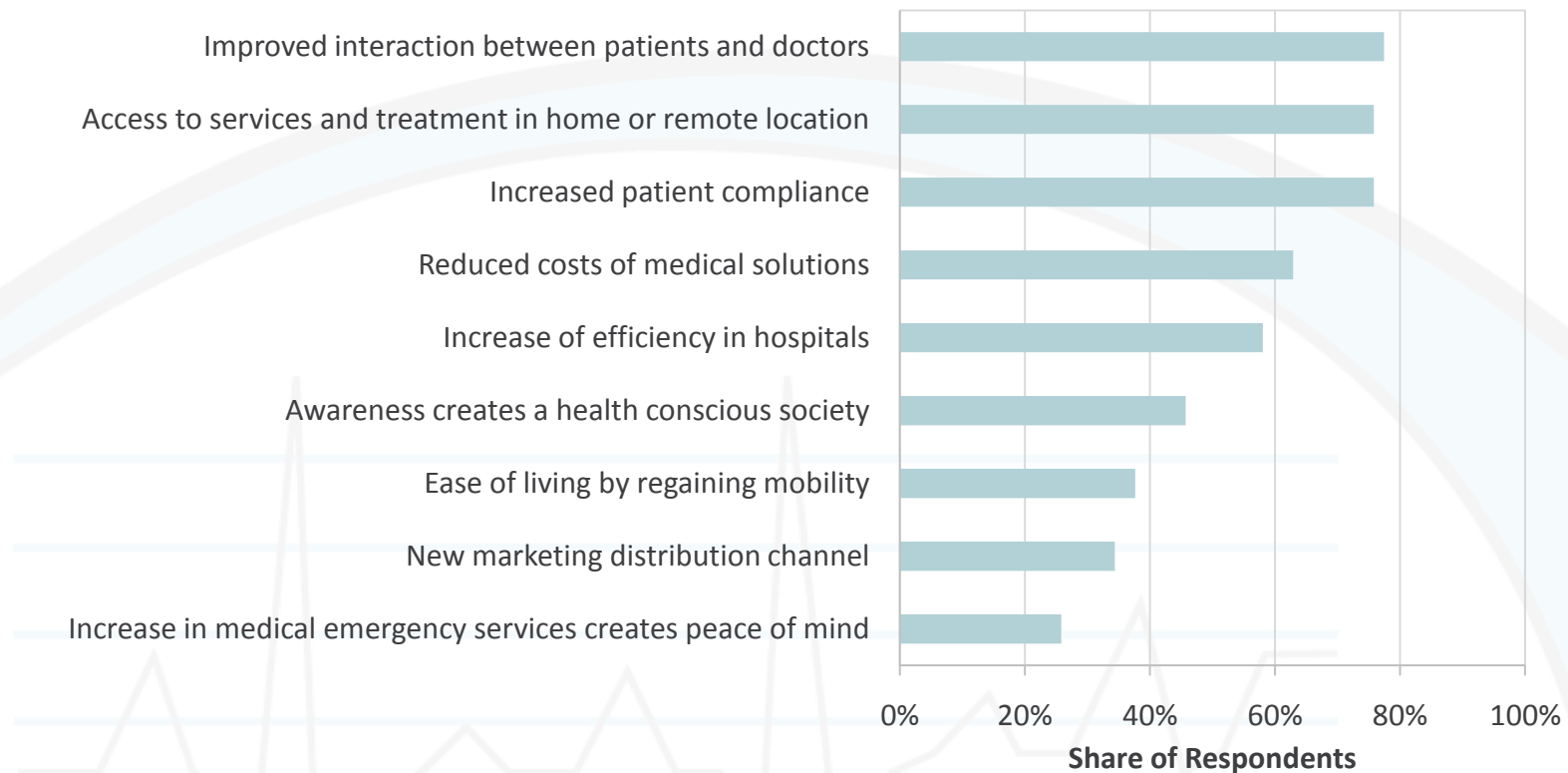
“ There is too much focus on Smartphone Apps and not Web Apps. Web Apps will be the future!”

“ 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

How can the industry benefit from mHealth solutions?



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

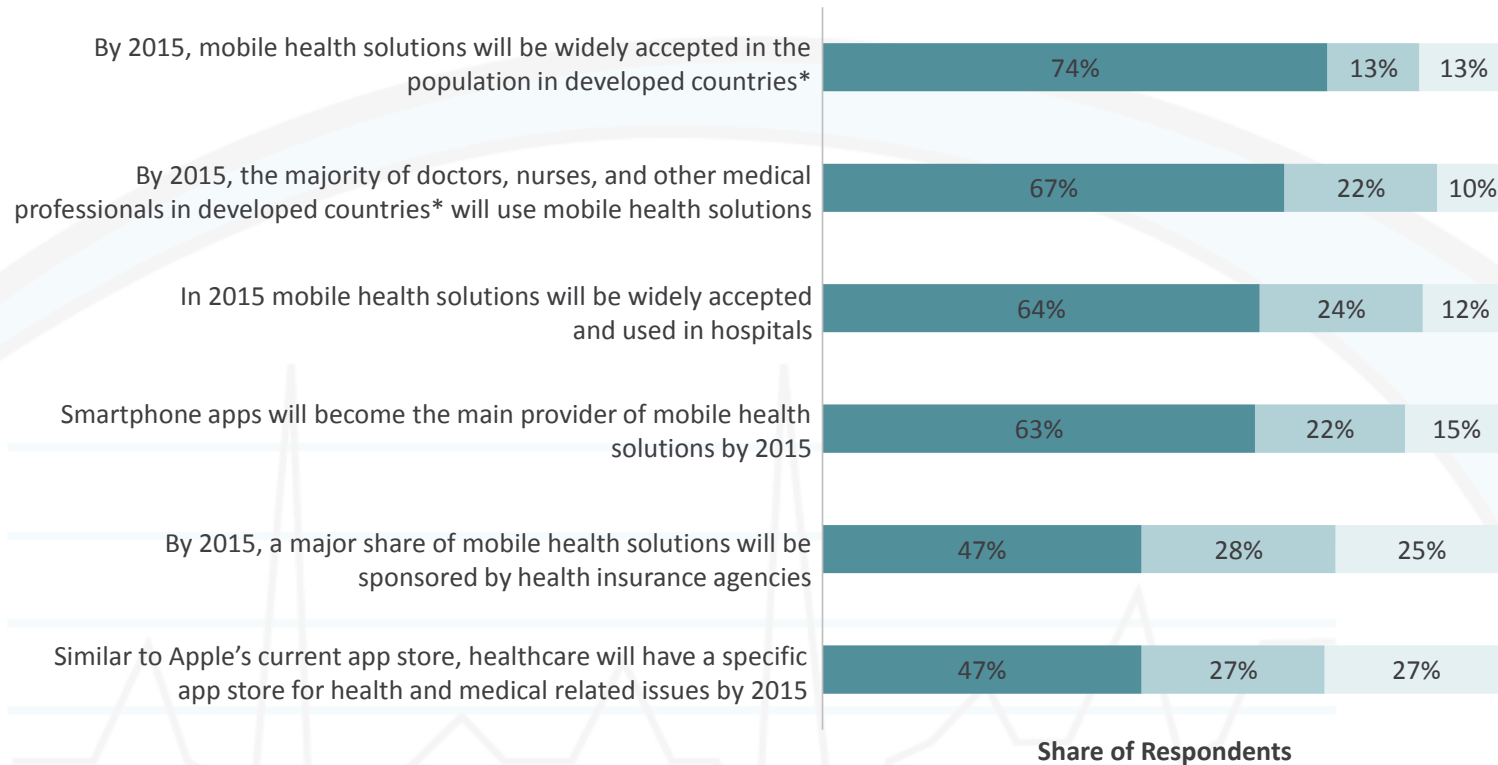
“ It [mHealth] helps providers to improve their service delivery, resulting in better health and greater satisfaction in their patients. The end result will be reduced healthcare costs, increased productivity and overall happiness in human lives.”

* HCPs: Healthcare professionals

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

Please tell us your opinion about the following hypotheses:

■ Agree ■ Disagree ■ Don't know



“An emerging market for mHealth could be India. Even though it is still a developing economy, it is a country where acceptance of technology is very high due to a large population in the age group 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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Number of Paid & Free mHealth Apps per App Store



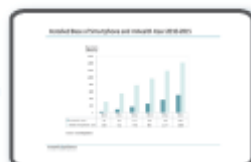
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mHealth App Market Drivers 2010 -2015



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Price Comparison mHealth vs. Total App



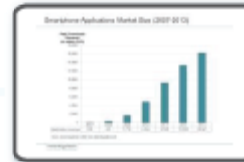
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App Store Race (2000-2010)



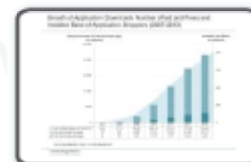
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