Global mHealth Developer Survey

Summary of Survey Results
February 2012

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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.

### 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

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**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 participants include (total 377 respondents)

- 2B Limited
- Aalborg University
- Aastrom Biosciences, Inc
- Able Eye Device Co., Ltd
- Accenture
- Across Health
- ADL
- Advanced Medical Solutions plc
- Aetna
- Alcon Inc
- allian eades & associates p/l
- Allergan
- Alsys Technology (Pty) Ltd
- Anakena Solutions
- Ansell
- Anson Group
- ANT+ Wireless
- App diagnosis AB
- Apple Inc.
- Blue highway, Inc.
- Boehringer Ingelheim
- Business Republic
- Carefusion
- Carefusion
- Castrosin
- Catalent Pharma Solutions
- Celentso AG
- Celsene Corporation
- Celinnovo
- CHW
- CINTERION, a Gemalto company
- Cipla Ltd.
- Cognovant, Inc.
- Coloplast do Brasil Ltda.
- Commonwealth Management Services
- Complete Digital
- Comstrander
- Cooldesign Agency
- CooperVision
- CoreApp
- CPMG
- CTS
- CVS/Caremark MinuteClinic
- Dakota State University
- DCIS
- Devicix
- Diya IT Solutions
- DLS HEALTHCARE CONSULTING, LLC
- Drapin & Co.
- eczacibasi
- e-Health Media
- Eyelab S.r.l.
- Elsevier
- Empathy Lab
- Engage
- Ericsson Nikola Tesla
- ESI
- Essential Research
- Essilor USA
- EveryFit
- Executive Impact Group
- Fitness Fulfillment
- FLA
- Flaxworks
- FutureHealth.com.au
- GE Healthcare
- GehS
- Gill Creative Resources
- GMHP
- H2Online
- HS System, Co., Ltd.
- haptique, inc.
- Health Interactions
- Health Ministry
- Health over IP (HoIP)
- Hewlett Packard
- Hytec
- HMRC
- Hospira
- Hospital Gift Shop, Inc.
- Huawei
- Humana
- ICW
- iLabs Medical
- IMAGE Information Systems Europe Ltd.
- Imaxdi
- IMI-Health AG
- IMS Health
- Informa
- Innovate Vertical Solutions
- Institute of Electronic Business
- Inteclare Ventures, LLC
- Intellegio Health Management Resourcing
- Intuitive Health
- iPLATO Healthcare
- IRWAA LLC
- Iteology Partners
- Yankee Group
- Johnson & Johnson
- Kairos Future
- Kaiser Permanente
- Kaltersoft - iMS Partner
- kalbe farma, tbk
- Katholisches Klinikum Bochum
- KCI
- KePro
- Lavando Mobile Solutions GmbH
- LifeQube
- Lifesense
- LifeWIRE CORP
- Magyar Telekom
- Mayo Clinic
- Mango Informatics P.L.
- Marylhurst University
- Matrix Group
- Maxum Healthcare Services
- McKesson
- mDiagnostics
- Medco Health Solutions
- MEDgile
- Medical Connectivity Consulting
- MedicApp Corp Ltd
- Medimov.com
- Melbourne Health
- Merck
- Merck Serono
- mHealth Evolve
- Mobidarm
- mobile health expo
- Mobile PRM
- Mobile Solutions Company
- Modern Health Talk
- Mole Productions
- Moleac Pet. Ltd.
- MPI
- MSD
- NATO Training Mission
- Nesco
- Neural Diagnostics Pty Ltd
- Nevicrocp
- New Leaf Ventures
- NHS West Midlands
- NIH
- NHP Inc.
- Nonin Medical
- NowPos M-Solutions
- Nutricia Advanced Medical Nutrition
- Nutricia Ltd (Danone)
- Oakley Medical Practice
- OHSU
- Optasia Medical
- OptMedis AG
- OptumInsigh
- Ozan Batgun
- Pacifica Senior Living in San Leandro
- PAREXEL
- PatientKeeper, Inc.
- Philips
- Phoenix Consulting MLI
- Planet Hobi
- Planet Siol.net
- PDM Exports, Inc.
- Praetorian Services Plc
- PT KalbeFarma
- Publicis Life Brands
- Publicis Life Brands Resolute
- Ranbaxy
- Robbins Interactive
- Roche Pakistan Limited
- Rock Health
- Rosetta Marketing
- RTC North Ltd
- Saint Joseph Health System
- sal hospital
- Scottish Healthcare
- Sensei, Inc
- Shenzhen Comen Medical Instruments
- Sky International
- Smart Online
- Smiths Medical
- Sofomo Embedded Solutions Pvt Ltd
- lifeplot.in
- Sonic Healthcare
- South West Yorkshire NHS
- Spyder Digital Research Inc
- St Jude Medical
- Strategy Analytics
- Striker
- Tacito Software
- Tech Data
- Technikum Wien
- TeleThrive
- TELUS
- Teva
- Tilab
- UCB
- UNC Hospital
- University of Auckland
- University of Otago
- USANRMC/TATRC
- Vasterbotten County Council
- Vestre Viken HF
- Virgin Active (Pty)
- Viropharma
- vivmed
- WEB on The Web
- WellDoc
- WHO
- ...and single experts

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Key take aways

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

<table>
<thead>
<tr>
<th>Therapeutic Area</th>
<th>Share of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>XXXXXXXXXXX</td>
<td>80%</td>
</tr>
<tr>
<td>XXXXX XXXXXXX</td>
<td>45%</td>
</tr>
<tr>
<td>XXXXX XXXXXXX</td>
<td>40%</td>
</tr>
<tr>
<td>XXXXXXXXXXXX</td>
<td>39%</td>
</tr>
<tr>
<td>XXX</td>
<td>25%</td>
</tr>
<tr>
<td>XXXXXXXXXXXX</td>
<td>24%</td>
</tr>
<tr>
<td>XXX</td>
<td>24%</td>
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<tr>
<td>XXX</td>
<td>24%</td>
</tr>
<tr>
<td>XXXXXXXX</td>
<td>22%</td>
</tr>
<tr>
<td>XXXXXXXX</td>
<td>18%</td>
</tr>
<tr>
<td>XXXXXXXX</td>
<td>16%</td>
</tr>
<tr>
<td>XXXXXXXX</td>
<td>6%</td>
</tr>
</tbody>
</table>

"Doctor's prescriptions are most often a mixture of XXXXXXXXXXX and XXXXXXXXXXX. Pharmacists are doing all they can to XXXXXXXXXXX. mHealth has the power to XXXXXXXXXXX and XXXXXXXXXXX thus mHealth holds the key to both critical aspects of XXXXXXXXXXX."
**XXX, XXXXXX and XXXXX 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?

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Share of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>XXXXXXXX</td>
<td>48%</td>
</tr>
<tr>
<td>XXXX XXXXXX</td>
<td>40%</td>
</tr>
<tr>
<td>XXXX XXXXXX</td>
<td>37%</td>
</tr>
<tr>
<td>XXXX XXXXXX</td>
<td>37%</td>
</tr>
<tr>
<td>XXXX XXXXXX</td>
<td>33%</td>
</tr>
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<td>XXXX XXXXXX</td>
<td>33%</td>
</tr>
<tr>
<td>XXXX XXXXXX</td>
<td>28%</td>
</tr>
<tr>
<td>XXXX XXXXXX</td>
<td>28%</td>
</tr>
<tr>
<td>XXXX XXXXXX</td>
<td>26%</td>
</tr>
<tr>
<td>XXXX XXXXXX</td>
<td>23%</td>
</tr>
<tr>
<td>XXXX XXXXXX</td>
<td>9%</td>
</tr>
<tr>
<td>XXXX XXXXXX</td>
<td>9%</td>
</tr>
</tbody>
</table>

“Already seeing a tsunami of health related apps driven by XXXXXX, not XXXXXXXX. Biggest issue in the next five years is XXXXXXXXXXXXXX. XXXX will delay provider adoption of these apps; development will be driven by XXXXXXXXXXX.”

“XXXXXXXXXX drives the system. They will go to XXXXXXX not for a XXX but for a XX, as they already did XXXXXXX by themselves through apps, web or any other tool.”

“Behavior is driven by XXXXXX. Medical Facilities can drive this through XXXXXXXXXXX etc.”

“Health insurance agencies in 2016 will be driven towards XXXXXXXX as millions of users use smartphone mHealth apps to live healthier and try avoiding or at least delaying the use of healthcare coverage.”
XXX is seen as the main driver for mHealth

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

<table>
<thead>
<tr>
<th>Force</th>
<th>Share of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ubiquity of mHealth solutions/apps</td>
<td>45%</td>
</tr>
<tr>
<td>Demographic growth of patient groups (elderly and chronically ill)</td>
<td>42%</td>
</tr>
<tr>
<td>Standardization breakthroughs</td>
<td>39%</td>
</tr>
<tr>
<td>Corporate involvement in the mHealth market</td>
<td>36%</td>
</tr>
<tr>
<td>Health regulatory bodies’ support</td>
<td>32%</td>
</tr>
<tr>
<td>Decreasing price of mHealth solutions</td>
<td>27%</td>
</tr>
<tr>
<td>Telecommunications involvement in health innovations</td>
<td>27%</td>
</tr>
<tr>
<td>Increasing partnerships between mHealth solutions and services</td>
<td>24%</td>
</tr>
<tr>
<td>Ease of product/service connectivity</td>
<td>23%</td>
</tr>
<tr>
<td>Ease of access to solutions</td>
<td>21%</td>
</tr>
<tr>
<td>Technological innovations</td>
<td>21%</td>
</tr>
<tr>
<td>User/patient demand</td>
<td>19%</td>
</tr>
<tr>
<td>Patient-centric care models</td>
<td>19%</td>
</tr>
<tr>
<td>Government demand for healthcare efficiency savings</td>
<td>18%</td>
</tr>
<tr>
<td>Smartphone penetration</td>
<td>18%</td>
</tr>
</tbody>
</table>

“The future of healthcare will not be in XXXXX, but will be in XXXXXXXXXXX. <...> This will be dependent on XXXXXXXX, XXXXXXXX and XXXXXXXX.”

“The mHealth environment has grown rapidly the last two years. It’s great that the XXXX and XXXXXXXXXXX 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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<td></td>
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</tr>
<tr>
<td></td>
<td>Call Sarah Barnard (+49 30 609893366)</td>
</tr>
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