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the app market specialists

EU Countries' mHealth App Market Ranking 2015

Which EU countries are best for doing mHealth business

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A benchmarking analysis of 28 EU countries about their market readiness for mHealth business

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In partnership with

mHEALTH SUMMIT | EUROPE

research2guidance's EU Countries' mHealth App Market Ranking

Content:

About research2guidance:

research2guidance is a strategy advisory and market research company. We concentrate on the mobile app eco-system. We are convinced that mobile health solutions will make a difference to people's lives and that the impact on the healthcare industry will be significant. We provide insights to make it happen and to successfully lead your business.

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TERMS OF RE-USE

The study has been conducted in partnership with HIMSS Europe.

Media partners:

1 SUMMARY

The EU Countries' mHealth App Market Ranking is a part of mHealth App Developer Economics, the largest global mHealth research program. This year more than 4,400 app developers, healthcare professionals and mHealth practitioners have shared their opinion on the global and EU market conditions.

This practitioners view is combined with a detailed facts based market readiness assessment for each country, based on five dimensions and 26 market condition criteria including eHealth adoption, level of digitalization, market size and health expenditure, ease of starting a business and the mHealth regulatory framework.

Denmark, Finland, The Netherlands, Sweden and the UK offer the best market conditions for mHealth companies in the EU. These countries score high in the market readiness assessment and mHealth practitioners confirmed that these countries offer good market conditions for mHealth. Any mHealth company should consider those top ranked countries as good starting points for their EU mHealth business.

Germany and France are the most complicated markets in the EU for mHealth. On one hand their market potential in terms of number of patients, doctors, hospitals as well as healthcare spending is a fact which is supported by most of the mHealth practitioners. On the other hand mediocre rankings in regulations, eHealth adoption by doctors and patients and the level of digitalization in the healthcare system is offsetting the market potential to a great extent. Companies from these countries equally recommend and refuse doing mHealth business in these countries.

Greece, Romania and Latvia are ranked low. These countries offer below average market conditions for mHealth and have also a bad reputation among mHealth practitioners.

In general countries differ in their market readiness for mHealth. In the market readiness criteria (e.g. smartphone penetration, tablet penetration, share of GPs using ePrescription) the best performing countries often offer more than twice as good market conditions compared to the countries with low rankings. mHealth companies must be aware of countries' differences and be very selective in their go-to-market approach.

Most EU countries have not started yet to target mHealth companies to attract the best talents and to get the best solutions for their countries to improve patient outcomes and to reduce healthcare costs. As a consequence these countries don't have an mHealth roadmap nor any guidelines that mHealth companies would value to securely invest in the country.
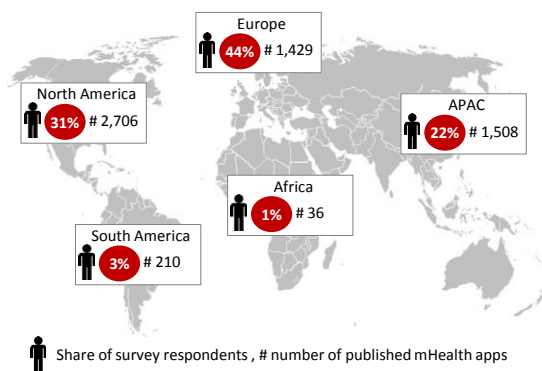
2 SCOPE AND METHODOLOGY OF THE STUDY

The report is part of the "mHealth App Developer Economics" research program, which has been executed for the fifth time this year. The research program represents the largest knowledge base of mHealth app developing and publishing globally. This year more than 4,400 mHealth app publishers have shared their views on the current status of their work and how the mHealth app market will evolve over the next years.

5,000 mHealth practitioners have been asked to rank EU countries for their mHealth market conditions

The EU countries' mHealth App Market Ranking builds on the results of the research program in terms of how do mHealth app publishers evaluate the EU member states for their mHealth business. The participants have been asked to rank the best and worst 3 countries from within the 28 EU countries for doing mHealth business. In addition they have provided reasons for their rankings. This is often a very pragmatic view based on their own experience with doing business in that country but also on what they have heard from others.
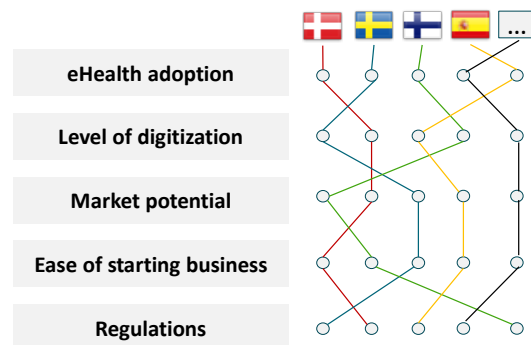
THE EU MHEALTH APP MARKET READINESS STUDY IS BASED ON THE RESULTS OF TWO RESEARCH PROGRAMS

① MHEALTH APP PUBLISHERS MARKET ASSESSMENT

Europe 44% # 1,429
North America 31% # 2,706
APAC 22% # 1,508
Africa 1% # 36
South America 3% # 210

Share of survey respondents , # number of published mHealth apps

How do mHealth app publishers rate the EU mHealth market conditions ?

② EU MHEALTH APP MARKET READINESS ASSESSMENT

- eHealth adoption
- Level of digitization
- Market potential
- Ease of starting business
- Regulations

How can 26 EU countries be rated according to 5 mHealth app market readiness dimensions?

The second pillar of the EU country mHealth market readiness study is a fact based country assessment along 5 dimensions.

The 5 mHealth app market readiness dimensions characterise the main market conditions in a country which have an impact on the business of an mHealth company, an established healthcare player or a start-up. Each country has been ranked along the 5 dimensions and their 26 market condition criteria.

eHealth adoption dimension

A set of criteria which illustrates how doctors and patients use the online channels (mobile or web) to communicate, inform and exchange information. One would expect that the more the stakeholders in a country use these channels the easier it is to explain, market and integrate a new mHealth service. The criteria of the eHealth adoption dimension are:

☑ GPs using electronic networks to transfer prescriptions to pharmacists (% of GPs)

☑ Patients making an appointment with a practitioner via a website (% of internet users)

☑ GPs exchanging medical patient data with other healthcare providers and professionals (% of GPs)

☑ Internet users seeking online information about health (% of internet users)

Level of digitalization dimension

A set of criteria that captures the penetration of capable devices within the population and their usage.
The higher the penetration of smartphones and tablets and usage the better for any mHealth app business.

☑ Smartphone penetration (% of population)

☑ Tablet penetration (% of population)

☑ Number of used apps (average)

☑ Mobile internet usage (% of population)

☑ Regular internet users (% of population)

mHealth market potential dimension

The market potential for mHealth apps is linked to the number of potential users/patients/hospitals and the level of the healthcare spending in the country.

☑ Population (total)

☑ Number of doctors, nurses, hospitals (total)

☑ Number of hospitals (total)

☑ Health expenditure out of pocket (% of total)

☑ Health expenditure (% of GDP)

☑ Health expenditure (per capita)

Regulatory dimension

Regulation in a country can support mHealth business in providing clear guidelines of what is allowed and what is not allowed, which can reduce uncertainty. Countries differ in how they support electronic health records (EHRs) and ePresciption which is not relevant for all mHealth business models but having an open EHR and ePrescriptions available in a country widens the options for mHealth companies significantly.

☑ Acceptance of ePrescription

☑ Implementation of EHR

☑ Standards on EHR interoperability

☑ Permission for secondary uses of data from EHR

☑ Permission of remote treatment

☑ Existence of e/mHealth guidelines

☑ Acceptance of health data transfer

☑ Restrictions on mHealth data storage

Ease of starting a business dimension

Countries also differ in how complex it is to open up a new business, not only in mHealth.

☑ Time needed to start business (days)

☑ Number of necessary procedures (total)

☑ Taxes (%)

The report gives valuable insights and guidelines for any company that wants to start an mHealth business within the EU as well as for government organizations in the countries that want to better leverage and stimulate the potentials of a flourishing mHealth ecosystem within the country to create jobs that require skilled labour, reduce national healthcare costs and ensure high levels of quality of care.

For inquiries about the report but also for questions related to the EU mHealth App Business Accelerator program please get in contact.

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