



# Connected Health

## Trends in the Mobile Health Industry

January 2013

TRENDS  
& FUTURES

# WHAT'S IN THIS REPORT?



**The Context**

**Tapping healthcare challenges**



**Emergent mHealth trends & applications**

**The Future of mHealth**



**Implications and recommendations**

# IF YOU ONLY HAVE A MINUTE...



Global healthcare systems are struggling to cope with shrinking budgets and growing demands

Mobile Technology is disrupting the way we share information. Patients and other consumers are using digital tools to empower them with information to take control of their own health



mHealth can help tackle some of the current challenges by providing greater access to care, helping to reduce admin costs and saving money on elderly care. Emerging trends and applications include remote monitoring, fitness & general wellness, adherence & public health campaigning

mHealth demand is increasing, driven by users' desire for instant information. To maximise the potential of mHealth it is vital that the needs of end users (patients, consumers or HCPs) are fully accounted for at development stage



Will mobile become a “doctor in your pocket”?

Will mobile be used to its full potential, increasing access to care services and slashing healthcare bills?

*There has been much hype and excitement around Mobile Health, with no clear indication of how it will fall out to deliver maximum potential...*

**“We always overestimate the change that will occur in the next two years and underestimate the change that will occur in the next ten”**

Bill Gates



# But what exactly is mHealth?

There is no set definition of mHealth but most definitions allude to a similar overarching theme. In this report we will use the following definition:

**“mHealth is anything that uses wireless technologies to collect or transmit medical or health information. Health information is used in its broadest sense: it can include dietary activity, texts tracking vaccines or could be ECGs from a pacemaker”**

Source: KOL USA Policy Advisor (Ipsos study)



# PUTTING mHEALTH INTO CONTEXT...



## Increasing connectivity

- Mobile Technology is disrupting the way we share information: both healthcare consumers and providers are increasingly using internet connectivity and wireless devices to help them manage their health and care for others
- Patients and general wellness consumers are well equipped to monitor, diagnose and improve their health – this will have a profound effect on how professional healthcare services are delivered in the future
- There already exists a host of apps and devices which allow consumers to self monitor their health and share vital information with health service providers

# The world is becoming more and more connected...

There are **6 billion** mobile phones worldwide



**75%** of the world's population have **access to a mobile phone**

**85%** of the world's population are **covered by a mobile network signal**

**13,000** consumer health apps available through Apple App store in 2012

**247 million** mobile health apps downloaded in 2012



# ...and doctors are also well connected using multiple devices for professional purposes



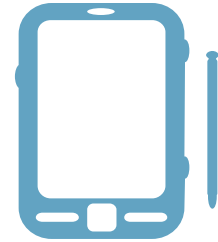
**Desktop**  
**86%**



**Laptop**  
**85%**



**Mobile**  
**84%**



**Tablet**  
**54%**



Doctors spend almost **22 hours a week online** of which **over 50% is work related**

Doctors are **2x more likely to use online resources over print** when making clinical decisions





# REPORT PREVIEW

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