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PART 2 - SURVEY 2015

The mHealth eco-system: WHO WILL WIN AND WHO WILL FOLLOW?

PART 2: THE MHEALTH ECO-SYSTEM:
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Survey: Telehealth and Telemedicine are the areas for growth in mHealth in 2015.

In March, we did a survey looking at what is driving change in the connected healthcare space to get a market perspective on what's winning now, we surveyed over 275 mobile health experts to see what they thought was reinventing healthcare.

The report, mHealth Who will Win and who Will Follow – Part 2 was conducted by Connected Health Media. It reveals the online poll results from 2015 as well as a comparison to our 2014 poll results.

Here is what we found.

When asked what the main barrier or challenge to mHealth were 21% of the respondents found it was the lack of data and solution interoperability followed by the lack of clear business models and fragmented market landscape which was very similar to the results of 2014 with both fragmented eco-system and business models topping the barrier list.

mHealth - Customer First

Although there seems to be a considerable number of challenges that are taking time to be addressed for deployment, the survey respondents when asked what benefits connected health will offer, over 30% picked customer engagement and improved well-being. A lot of the respondents believe that connected health will bring a host of benefits with 23% answering that all the answers will drive connected care. The results are similar to our 2014 survey with over 30% believing mHealth will offer a host of benefits with engagement at the top.

In one of our open ended questions we asked what the most interesting mHealth trend had been in the last 12 months and consumer acceptance to mobile health and increased awareness and engagement topped the charts.

Looking at the HIMSS Annual Leadership Survey, it also revealed that 72 percent of respondents report that consumer and patient considerations, such as patient engagement, satisfaction and quality of care will have a major impact on their organization's strategic efforts over the next two years.

Investment and security breaches were the next two trends that have been in the news a lot in 2015 already.

Security has been a key concern for the health industry with 51 percent of healthcare executives find data privacy is the biggest barrier to mHealth adoption, according to a survey of 144 executives and managers in the healthcare industry in 23 countries published by The Economist Intelligence Unit (EIU).

Last year's trends were different with wearables, personal health record collection and the entrance of tech giants making waves.

Rejuvenation of Telemedicine and Remote Care

We went on to ask what would be the biggest area of growth in 2015 and 51 percent of healthcare executives find telemedicine and telehealth to be the biggest growth area in mHealth followed by remote monitoring and wearable sensors. Pharmaceuticals role in mHealth saw a rise compared to our survey last year.

Could 2015 -2016 be the rejuvenation of telemedicine? The Global Telemedicine market in 2016 is predicted to be $27 billion, with Virtual Health Services making up $16 billion of that amount (BBC Research and Towers Watson).

Business models take centre stage

We asked respondents what their main area of focus is and business and marketing strategies took a chunk of the responses with data management and partnerships following on. Today it was announced IBM is partnering with Johnson and Johnson, Medtronic and Apple in a bit to transform healthcare. Clearly showing that mHealth in 2015 is about getting products deployed, making dollars of the data and finding the right companies to work with to deploy solutions and services.

The EMR integration with device data and social data question showed little change with over 60% believing there is minimal integration which is in consensus with last year.

The final open ended question to get respondents thinking focused on the most influential company within the connected healthcare space in the last 12 months. Last year's results featured Apple in the lead with its mention of Research Kit and the much anticipated iWatch. Blue Cross Blue Shield, Fitbit, Samsung, Google and RJW Foundation made the top 5. This 2014 survey was conducted after a summer of announcements by the big tech giants and their foray into the mHealth market.

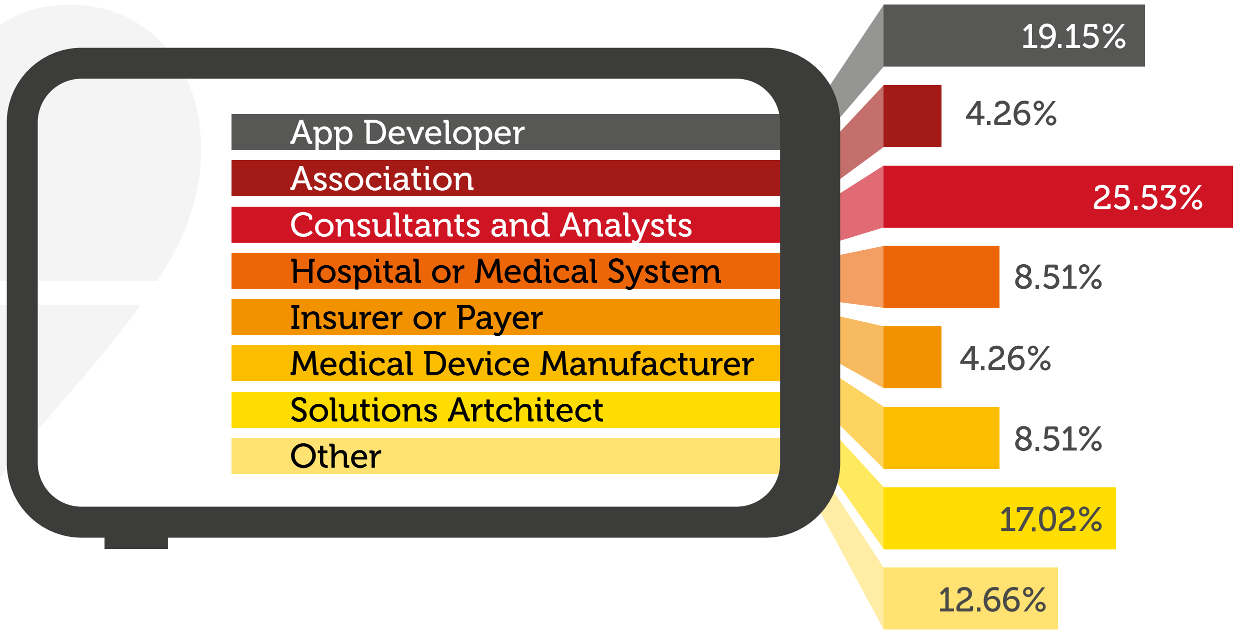
This year we still have Apple with the company most likely to reinvent and influence this space. With a bulk of the answers reiterating its ability to influence markets and engage users.

Companies that got a mention were Validic, All Scripts, HealthTap Epic, Partners Healthcare, Medtronic, Omada, Sense Health, and Medscape to name a new.

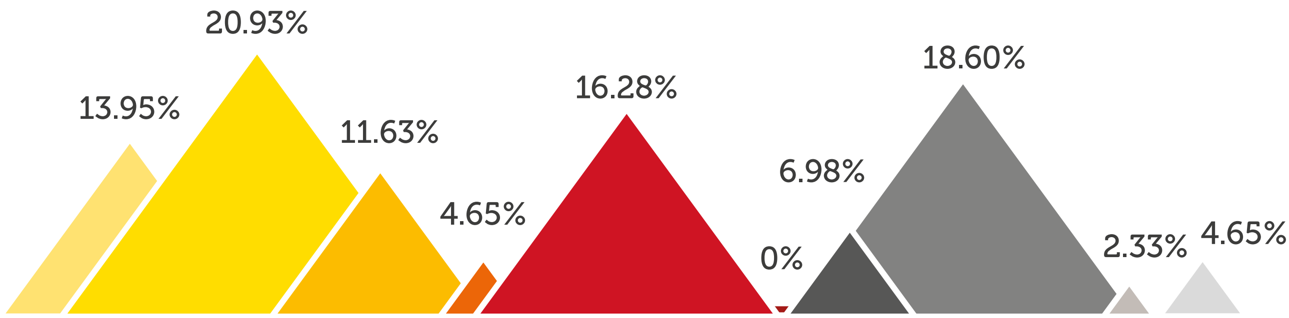
A total of 275 respondents compared to 207 were surveyed (breakdown below).

PART 2: THE MHEALTH ECO-SYSTEM:
WHO WILL WIN AND WHO WILL FOLLOW?

Q1. What is your company category?



Q2. Which is the main barrier or challenge to the mHealth ecosystem?



- Fragmented eco-system, not enough successful partnerships being formed
- Technical issues with interoperability between different solutions
- Lack of legal clarity over standards and regulation
- Lack of education about the technology available
- Data integration is not being used efficiently
- Challenges with wireless capabilities
- Low consumer confidence over trust and security
- Lack of a clear business model or business case
- Cost of administering and cost to end user
- Other

This infographic and survey were conducted by Open Mobile Media as part of our research for our event Connected Healthcare 2015 (June 18-19, San Diego, USA) Learn more here:

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PART 2: THE MHEALTH ECO-SYSTEM:

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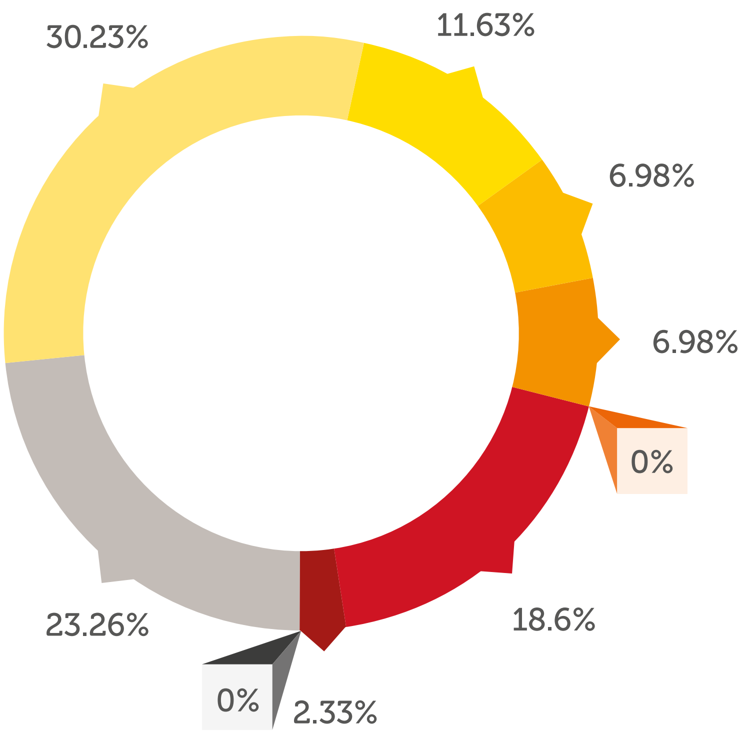
Q3.

When asked what were the most interesting trends seen in the last 12 months these were the ones that topped the list.

- Acceptance of mobile health
- Increased consumer awareness
- Explosion of investment and non-health companies entering the market
- Security breaches
- The rejuvenation of telemedicine
- The growing wearable and app market for medical use
- The concept of self-care
- Doctors and patients are embracing the technology
- Chronic disease management
- Integration efforts and platforms
- Acceptance and use of mobile health data for treatment

Q4.

What is the main benefit that connected health can offer?



- Customer engagement and improved well being
- Efficient management of data for and management of resources and conditions
- Geo-location and actionable treatment where required
- Reducing hospital readmissions and queues
- Improves physician and hospital work flow
- Better patient care both post and pre episode
- Reduced insurance pay outs and absenteeism
- Other
- All of the above

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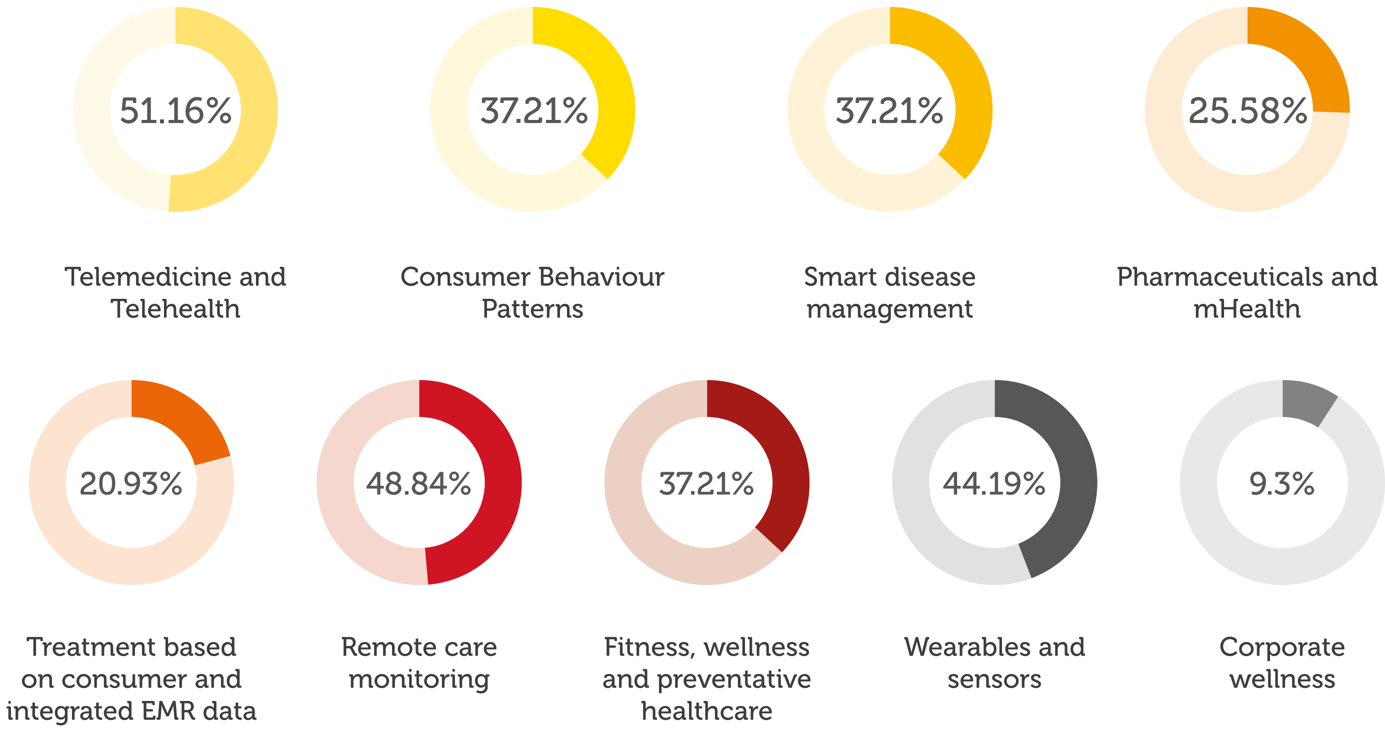
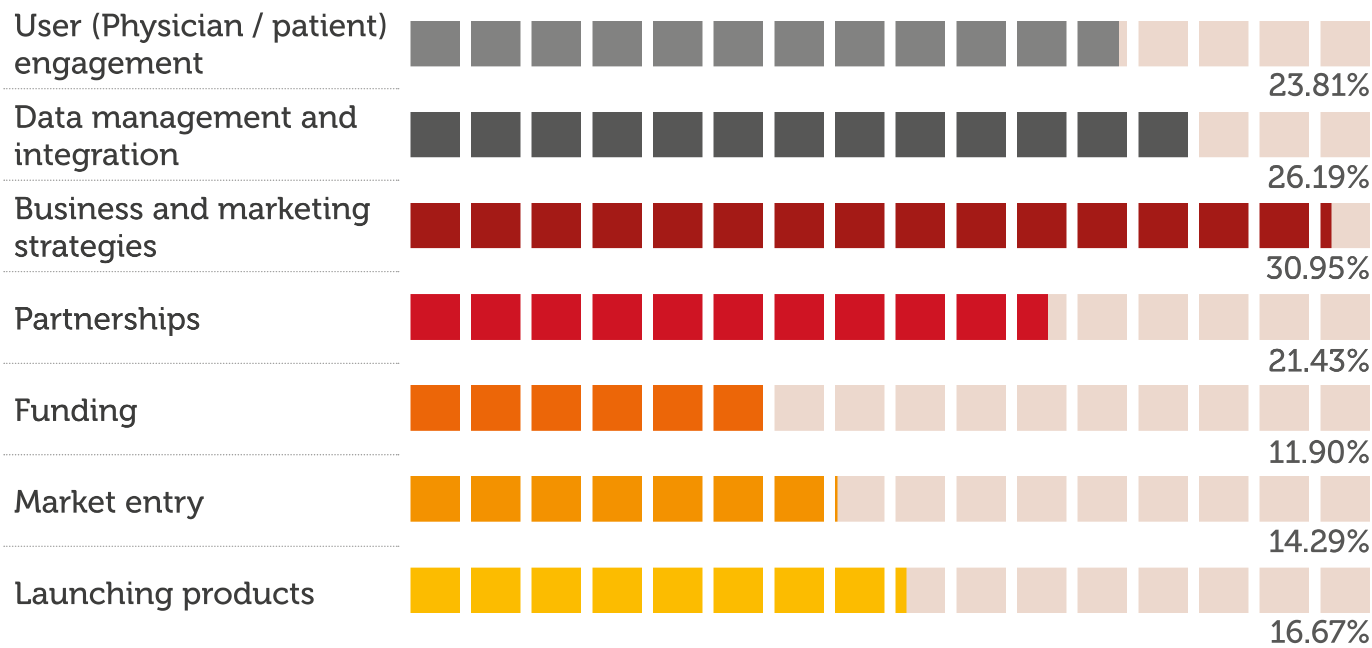
Q5. What do you think will be the area of growth in 2015 and 2016?



Q6. What is the main area of focus for you in 2015?



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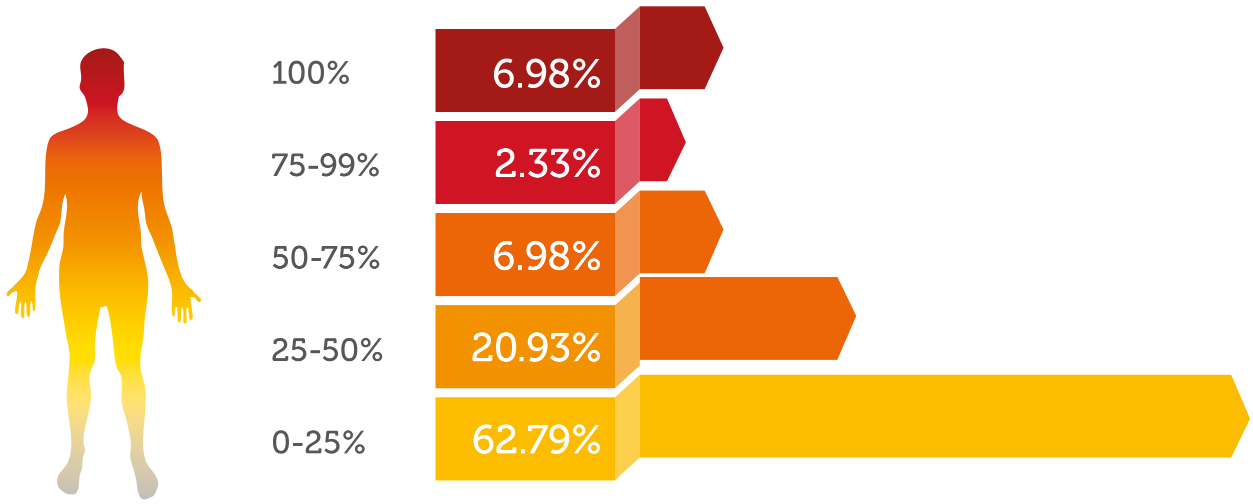
Q7.

From the data captured on Mhealth devices how much is integrated into EMR systems (comparision to the previous year)?



Q8.

Who has been the most influential company within the connected health space in the last 12 months?

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PART 1: 2014 SURVEY
WHO WILL WIN AND WHO WILL FOLLOW?

This is one of the pertinent issues being asked as the mobile health ecosystem evolves from enterprise and insurer lead healthcare to a more patient managed care model with data from wearable's, gadgets, remote monitoring and more transform healthcare delivery and services as we know it.

In early August, we did a quick survey looking at who and what is driving change in the space, whether companies and consumers are likely to embrace connected health services and to better understand what is driving and if anything, can slow adoption.

Here is what we found.
When asked to choose the what the main benefit connected health can offer, 22% of respondents said it was customer engagement and improved wellbeing, 17% chose better care pre and post treatment or episode, and 37% believe that all of the above factors will drive connected care.

When it came to the biggest challenge of barrier to the mobile health eco-system lack of clear business case or business model topped the list with 26% picking this option, followed by fragmented ecosystem and lack of successful partnerships (18%) and a close third was the technical issues and limited interoperability. 14% answered other and they believe reimbursement models, data management are also barriers to uptake.

Although there seems to be a considerable number of challenges for connected health deployment, the survey respondents when asked what impact connected health will have on patient engagement and care delivery we found a consensus with 47% saying a big impact, and 42% saying substantial impact. With only 5% unsure about the impact of connected health on patient care.

According to a PWC report 64% of doctors and payers see exciting possibilities but too few proven business models. So it's not going to be an easy climb.

We asked an a few open ended questions – one was in terms of impact which company has been influential in the last 12 months. There were over 35 companies mentioned with Apple taking the lead followed by Blue Cross Blue Shield, Samsung, Google, Kaiser Permanente and Fitbit. Rounding up the top ten we had Athena Health, AbilTo, AirStrip, the US government and Robert Johnson Wood Foundation

When asked from the data captured using mHealth tech how much is integrated into care and EMR systems majority of the respondents swayed towards limited integration if any.
With 60% saying that only 0-25% is integrated and 20% in the next bracket. Very few responses chose to pick full integration of data with hospital records.

A total of 207 respondents were surveyed, 20% were solution providers, 17% consultants, 13% app developers, 10% medical device manufacturers, 8% hospitals followed by insurers.

PART 1: 2014 SURVEY
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Q1. What is your company category?

4.7%	Association
9.4%	Medical device manufacturer
7.5%	Hospital
2.8%	Insurer
18.9%	Solution provider
0.9%	Wireless Carrier
13.2%	App developer
0.9%	Wearable manufacturer
1.9%	Marketing
16.0%	Consultant
3.8%	Hardware/device manufacturer
19.8%	Other

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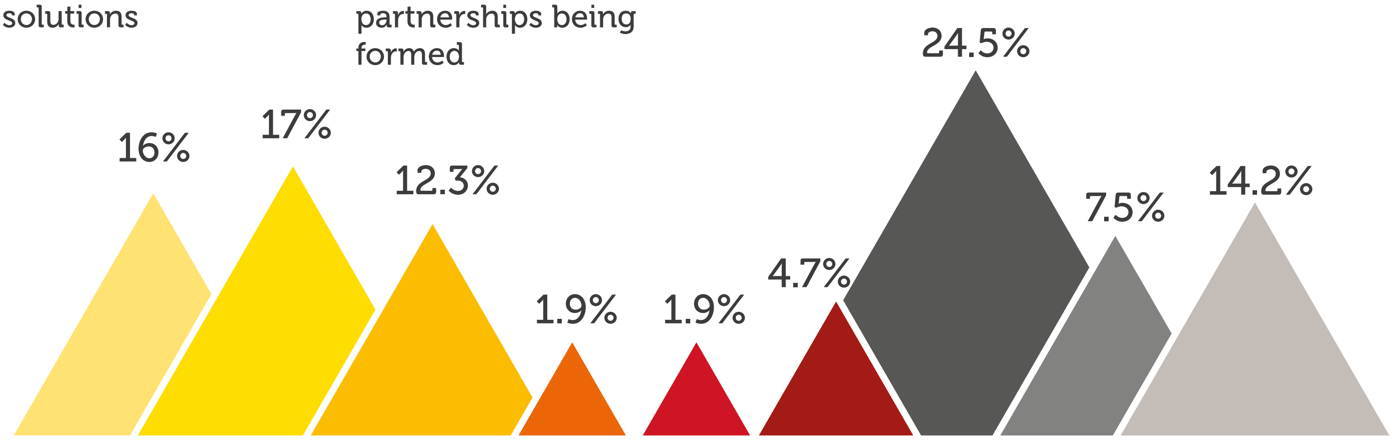
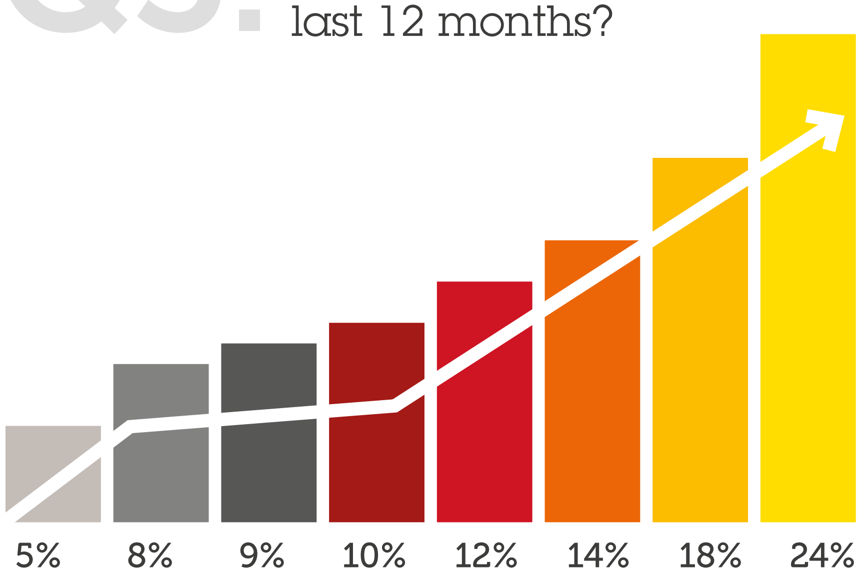
Q2. Which is the main barrier or challenge to the mHealth ecosystem?

- Technical issues with interoperability between different solutions
- Fragmented eco-system, not enough successful partnerships being formed
- Lack of legal clarity over standards and regulation
- Lack of experienced IT staff



- Challenges with wireless capabilities
- Low consumer confidence over trust and security
- Lack of a clear business model or business case
- Cost of administering and cost to end user
- Other

Q3. What has been the most interesting trend you have seen in the mobile health space over the last 12 months?



- Wearable's & personal health records
- Data collection & application
- Consumer adoption & awareness
- Entrance of consumer tech giants
- Mobile counselling
- Integration with current systems
- Telemedicine & remote monitoring
- Other

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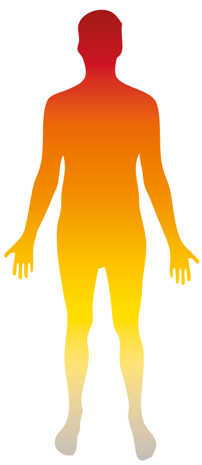
Q4. What is the main benefit that connected health can offer?

- 21.7% Customer engagement & improved well being
- 7.5% Data collection and management of resources
- 3.8% Geo-location and actionable treatment where required
- 5.7% Reducing hospital readmissions and queues
- 5.7% Improves physician and hospital work flow
- 17% Better patient care both post and pre episode
- 0% Reduced insurance pay outs and absenteeism
- 5.7% Other

36.8% All of the adjacent

Q5. What's the impact connected health will have on patient engagement and care delivery?



- 47.2% Big impact
- 42.5% Substantial impact
- 5.7% Minimal impact
- 0% No impact
- 4.7% Not sure

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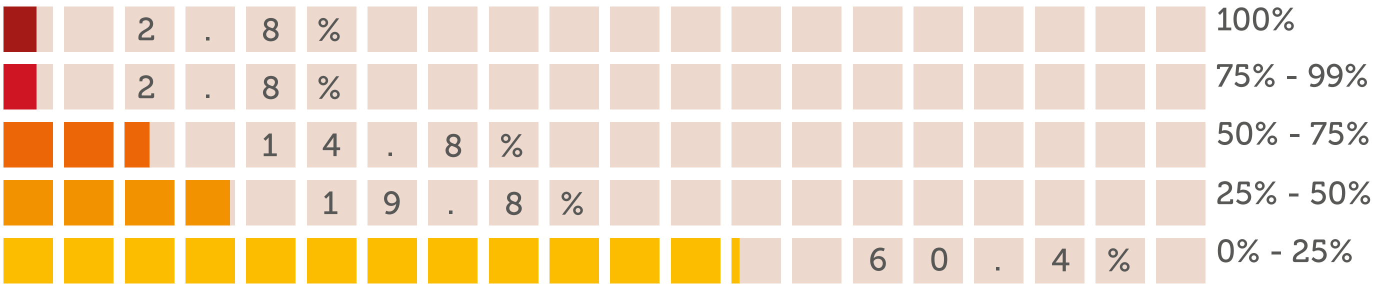
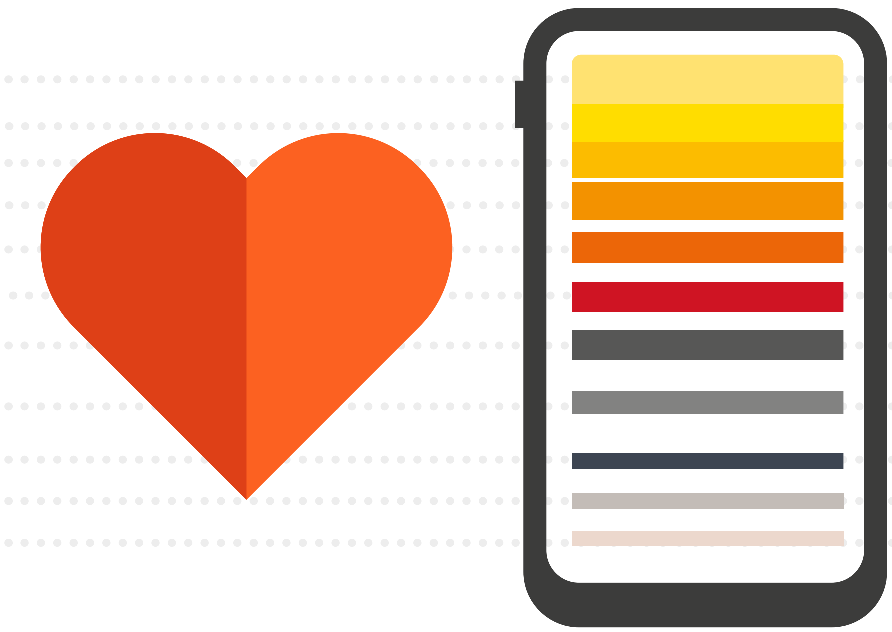
Q6. From the data captured on mHealth devices how much is integrated into EMR systems?



Q7. Who has been the most influential company within the connected health space in the last 12 months?



11. Apple
5. Blue Cross Blue Shield
5. Samsung
4. Fitbit
4. Robert Wood Jhonson
4. Google
4. Kaiser permanente
3. US Government
2. Athena Health
2. AirStrip
2. Abilto

Other companies mentioned... EPIC, FDA, WellDoc, Cedar Sinai, AT&T, Verizon and AliveCor

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