

Helping you
understand the
market opportunities
of mHealth apps.

Produced by



The Health Apps Market

- mHealth market is expected to reach \$111.8 billion by 2025
- Most revenue to come from app / cloud based services and wearables

- 75% of apps target consumers/ patients
- 25% of apps target HCPs



Usage

- 65% of mobile users have downloaded at least one health app
- UK Smartphone ownership is at 85%
- Around 320,000+ health apps
- Most are 'general wellness' apps but health condition management apps now account for 40% of all apps.
- Apps that provide disease specific support have grown from 10% to 16%; the top 5 therapy areas they focus on are all chronic conditions

What this means

- New medical models are emerging
- New healthcare ecosystem is developing

Current Healthcare Challenges

- Ageing population
- Unhealthy lifestyles
- Staff shortages
- Community care
- Budget cuts

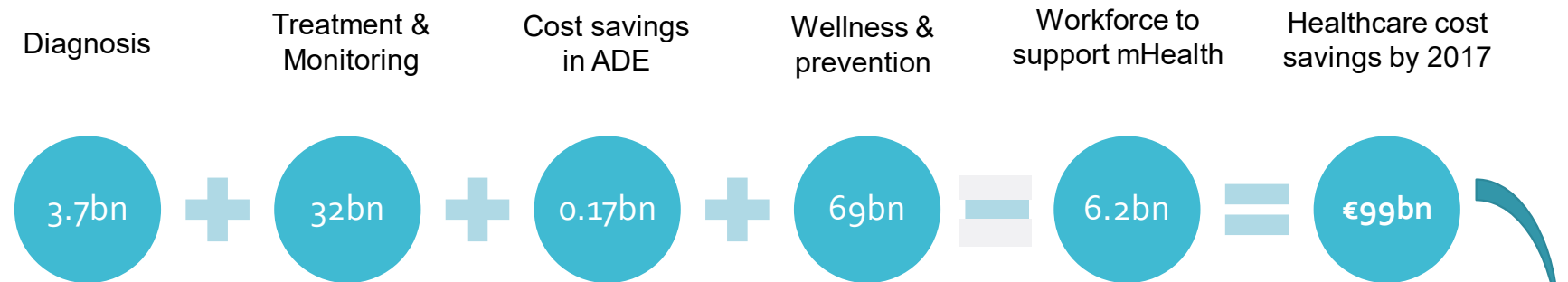


What mHealth brings to healthcare

- Enhances the efficiency & effectiveness of care
- Improves clinical decision making
- Offers remote monitoring
- Reduces hospitalisation
- Better utilisation of DRs time
- Patient-centered care
- Savings

€99 billion in savings in care costs

Potential Cost Savings



Equating to a potential of 40 million doctor days

Source PWC/GSMA
<http://www.gsma.com/connectedliving/socio-economic-impact-of-mhealth-an-assessment-report-for-the-european-union/>

Commercial Opportunities

- Addressing the challenges through mHealth solutions like health apps and medical device apps
- Yield cost savings and revenue enhancements

Solution areas

1. Wellness & Prevention
2. Expediting Diagnosis
3. Treatment & Monitoring
4. Stronger Healthcare Systems

Wellness & Prevention

- Apps that equip consumers with relevant information and tools
 - Empowering them to make improved and informed lifestyle choices leading to better health/reducing the risk of chronic disease
 - Monitor diet, physical activity & medications
- Diabetes apps have led the way
- myCOPD has been a success

Expediting Diagnosis

- Delay in diagnosis of chronic diseases increases complications and treatment costs
- Apps that enable remote diagnosis and self-assessment of symptoms
- Enable HCPs to detect diseases earlier & facilitate timely medical interventions
- AirStrip Cardiology – remote diagnosis & treatment decision making tool for heart patients / Shares ECG data

Treatment & Monitoring

- Delivering continuous care remotely can help to reduce re-admission rates and establishes early warning systems
- Reduces care costs and helps to prioritise patients more effectively
- Apps that improve adherence & remote treatment
- Examples: iBG Star / Be Mindful

Stronger Healthcare Systems

- mHealth can improve
 - practitioner support
 - helping HCPs stay informed
 - better utilisation of DRs time
- Medical Education - *DrCompanion*TM app
- Medical Toolkits – Calculators/Med Devices
- Streamline Admin Systems/Pathways
- Data Capture & Analysis (Big Data)

Where is the market now?

Stage 1

- Led by consumer friendly products ties to fitness and general wellbeing (like the Jawbone / Fitbit)

Stage 2

- **We're here!**
- Apps & mobile connected devices permeate the medical field
- Regulatory bodies catching up (transitioning from MDD to MDR)

Stage 3

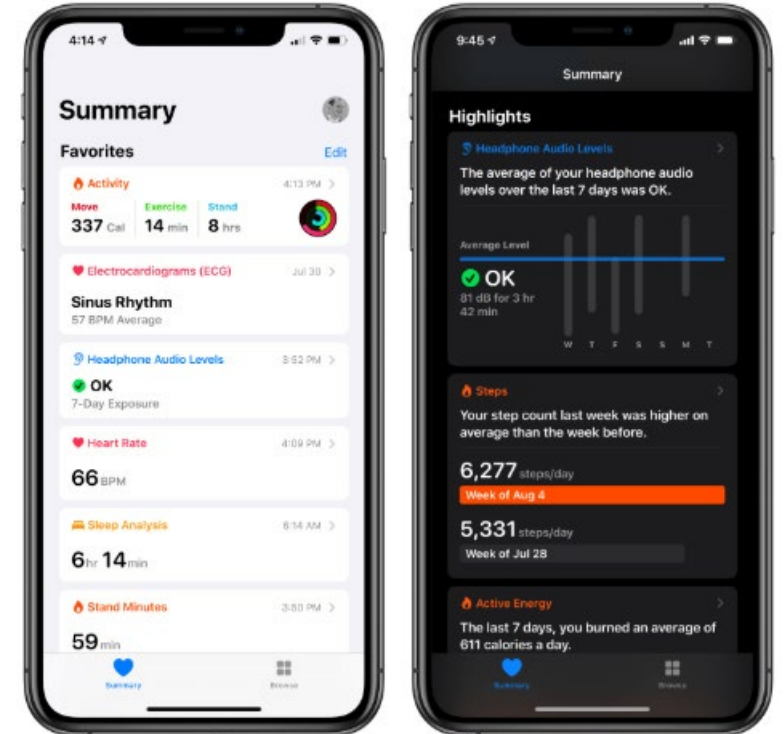
- Mobile, wearables & data-collection devices mesh together
- Provide the backbone for optimisation & customisation of preventative health, medical treatment & hospital processes
- Artificial intelligence and machine learning helps to create 'smarter' software

But we face some barriers

1. Political – how to align mHealth with national healthcare strategies
2. Technology / Interoperability standards
3. Security & data protection
4. Regulatory / Compliance / Brexit
5. Engage patients / HCPs earlier during solution design
6. Lack of evidence of clinical/economic benefits
 - Before email became widespread, Intel's surveys showed that most people claimed not to want it!

The Future

- Sophisticated Wearables & Device Integration
- AI - artificial Intelligence
- BIG DATA & personalisation
- Integrate disparate and large volumes of data to provide a holistic health view
- Global pandemic tracking & early warning systems



Your App Project - Considerations

- Mobile Health Strategy
- Target Audience Needs
- Commercial Model
- Platforms & Devices
- Distribution Model
- Technology Integration
- Connectivity
- Stress Testing
- Compliance & Data Security
- Marketing
- Tracking & Refining



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