



HIMSS Europe

Thought leadership for better health through
information technology

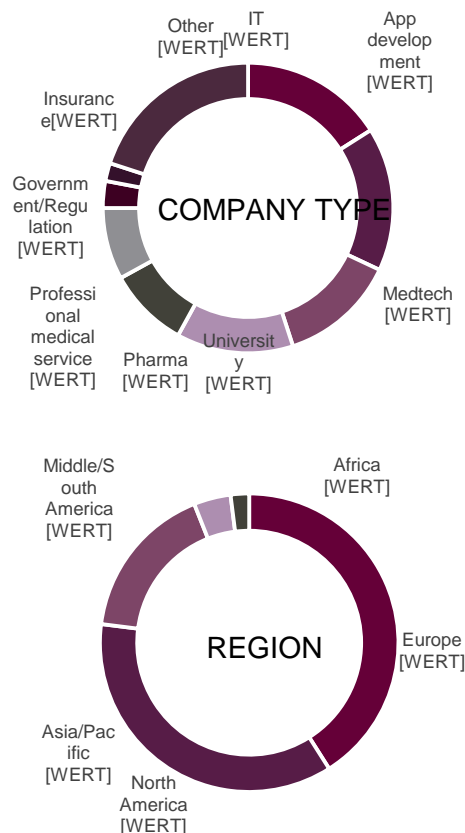
Market Readiness for mHealth Apps

Results from the EU Market
Readiness Study

Bern, September 15, 2015

HIMSS Europe

The largest research programme about mHealth app publishing globally



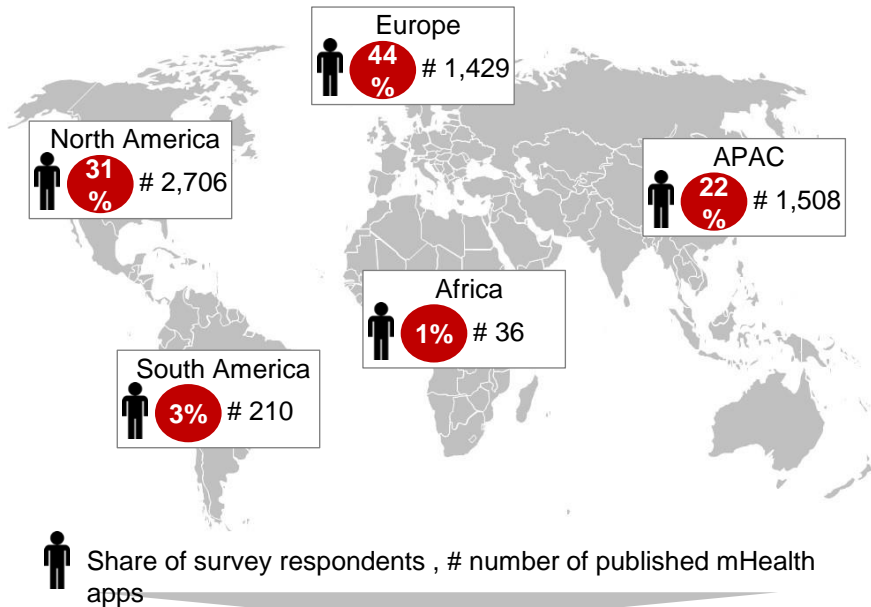
mHealth app economics research program

- Started in 2000
- Conducted yearly
- Based on a +30,000 mHealth app developer database
- This year's study includes more than 5,000 study program participants
- Annual study result publications reach a global audience of ten-thousands of mHealth publishers and decision makers
- Study program topics include: mHealth business models, app performance, mHealth sensors, chronic condition support, publisher profiling and more...

The EU mHealth app market readiness study is based on the results of two research programs

1

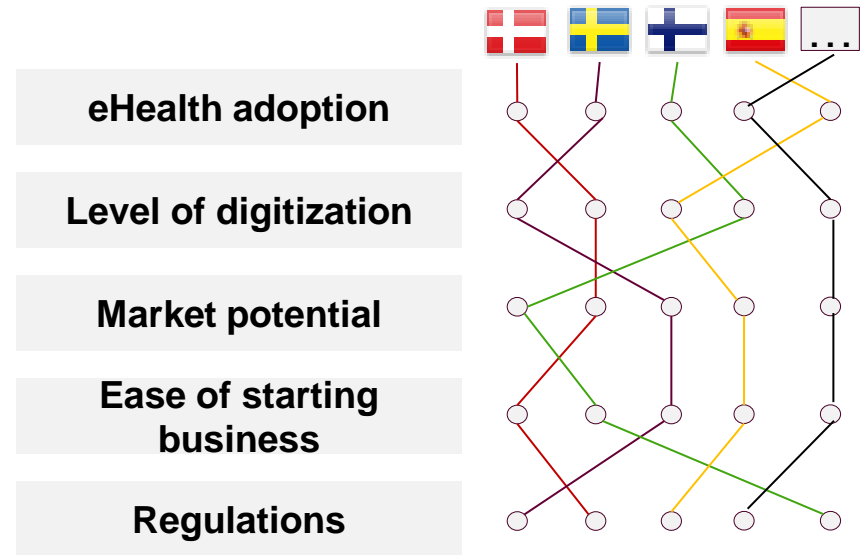
MHEALTH APP PUBLISHERS MARKET ASSESSMENT



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

2

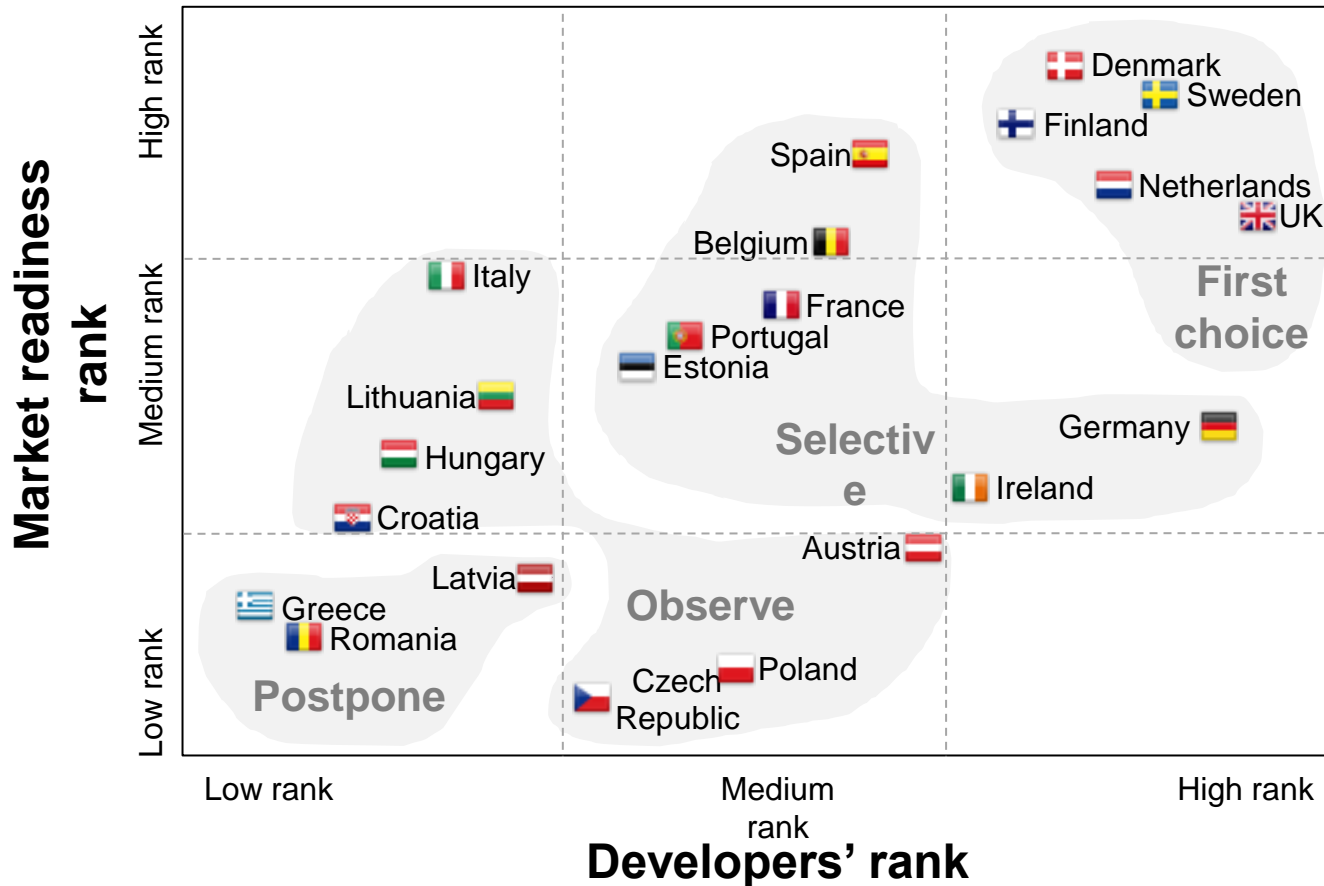
EU MHEALTH APP MARKET READINESS ASSESSMENT



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

5 countries offer best market conditions for starting a mHealth business in EU

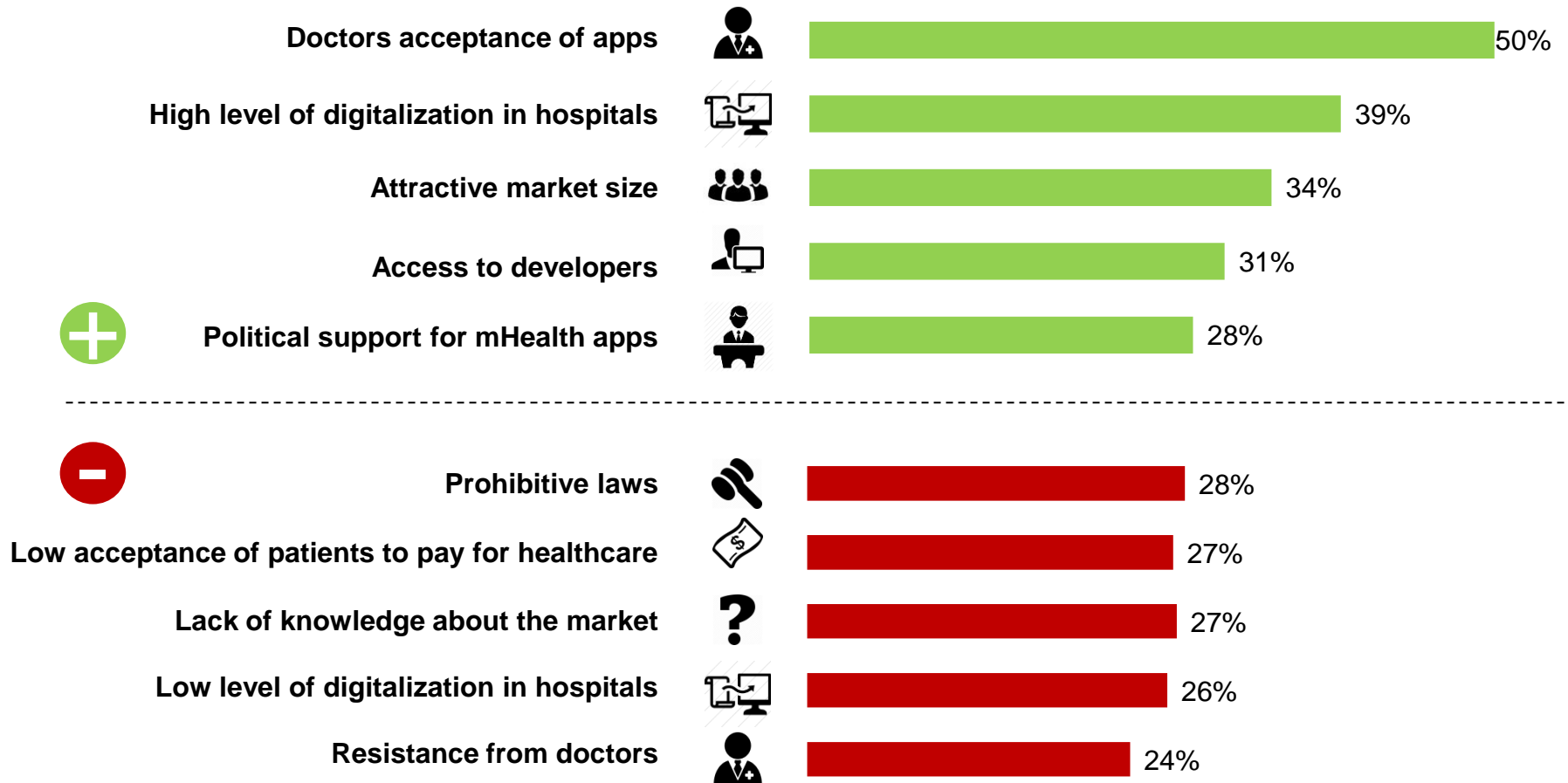
Comparison of country's rank in market readiness score and developer index



Developers rank – country rank by developers and decision makers,
Market readiness rank – rank of country based on eHealth adoption, level of digitalization among population, market potential, ease of starting business, mHealth regulations

Doctors acceptance of apps is most important for mHealth business success

Top 5 reasons why country offers favorable/poor market conditions

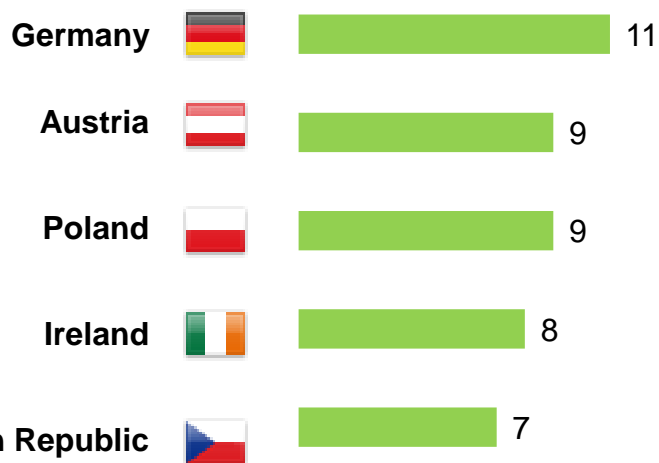


Germany is the most over-rated country by developers

Difference between country rank in market readiness score and by developers

OVER-RATED COUNTRIES

Difference between ranks



UNDER-RATED COUNTRIES

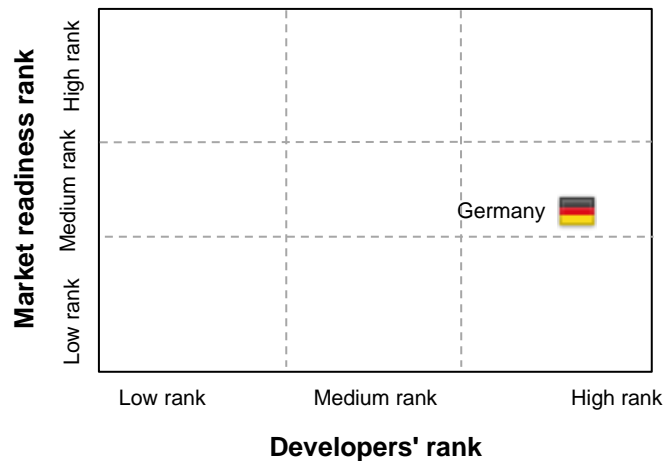
Difference between ranks



German mHealth app publishers are having a mixed view on the market

COUNTRY SUMMARY

Country position



PRACTITIONERS' VIEW

Positive view



Share of participants stating country offers good conditions
Breakdown by region



41%



Local companies with positive view



36%

Main reason

Attractive market size

Negative view



Share of participants stating country offers poor conditions
Breakdown by region



19%



Local companies with negative view



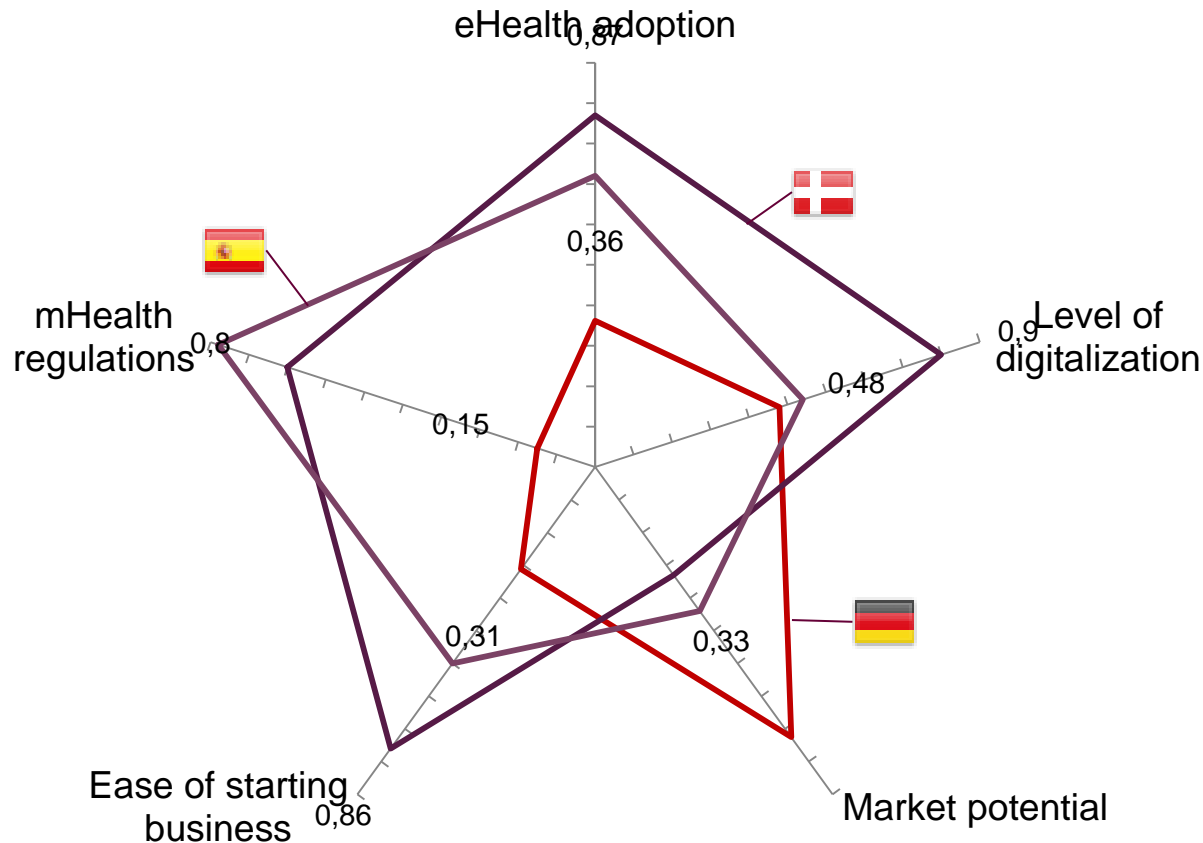
38%

Main reason

Prohibitive laws, resistance from trad. Healthcare players

The market conditions in Germany for mhealth companies is far away from being best in class

COMPARISON OF MARKET READINESS DIMENSIONS



mHealth business accelerator – an offering to support countries and companies to define their mHealth strategy

FOR COMPANIES

Country profiling

EU mHealth country rollout & marketing push

EU mHealth match making

FOR COUNTRIES

Country mHealth roadmap, strategy and guideline definition

mHealth app developer programs

180 days awareness & marketing push

Kontakt

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