Market Readiness for mHealth Apps
Results from the EU Market Readiness Study
Bern, September 15, 2015
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...

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Source: research2guidance - EU countries’ mHealth app market ranking 2015
The EU mHealth app market readiness study is based on the results of two research programs.

**MHEALTH APP PUBLISHERS MARKET ASSESSMENT**

- **Europe**: 44% #1,429
- **North America**: 31% #2,706
- **APAC**: 22% #1,508
- **Africa**: 3% #36

Share of survey respondents, # number of published mHealth apps.

**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?

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

Source: research2guidance - EU countries’ mHealth app market ranking 2015

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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

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# Top 5 reasons why country offers favorable/poor market conditions

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doctors acceptance of apps</td>
<td>50%</td>
</tr>
<tr>
<td>High level of digitalization in hospitals</td>
<td>39%</td>
</tr>
<tr>
<td>Attractive market size</td>
<td>34%</td>
</tr>
<tr>
<td>Access to developers</td>
<td>31%</td>
</tr>
<tr>
<td>Political support for mHealth apps</td>
<td>28%</td>
</tr>
<tr>
<td>Prohibitive laws</td>
<td>28%</td>
</tr>
<tr>
<td>Low acceptance of patients to pay for healthcare</td>
<td>27%</td>
</tr>
<tr>
<td>Lack of knowledge about the market</td>
<td>27%</td>
</tr>
<tr>
<td>Low level of digitalization in hospitals</td>
<td>26%</td>
</tr>
<tr>
<td>Resistance from doctors</td>
<td>24%</td>
</tr>
</tbody>
</table>

**Source:** research2guidance - EU countries’ mHealth app market ranking 2015
Germany is the most over-rated country by developers

Difference between country rank in market readiness score and by developers

<table>
<thead>
<tr>
<th>OVER-RATED COUNTRIES</th>
<th>UNDER-RATED COUNTRIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>Italy</td>
</tr>
<tr>
<td>Austria</td>
<td>Spain</td>
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<tr>
<td>Poland</td>
<td>Lithuania</td>
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<tr>
<td>Ireland</td>
<td>Hungary</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>Croatia</td>
</tr>
<tr>
<td></td>
<td>Belgium</td>
</tr>
</tbody>
</table>

Difference between ranks:

Germany: 11
Austria: 9
Poland: 9
Ireland: 8
Czech Republic: 7
Italy: 10
Spain: 5
Lithuania: 5
Hungary: 5
Croatia: 4
Belgium: 3

Source: research2guidance - EU countries’ mHealth app market ranking 2015

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

**COUNTRY SUMMARY**

- **Country position**
  - Germany: High rank

- **Market readiness rank**
  - Low rank

- **Developers’ rank**
  - Positive view
  - Low rank
  - Medium rank
  - High rank

**PRACTITIONERS’ VIEW**

- **Positive view**
  - Share of participants stating country offers good conditions
    - Europe: 36%
    - North America: 43%
    - Other: 48%
  - Local companies with positive view: 36%
  - Main reason: Attractive market size

- **Negative view**
  - Share of participants stating country offers poor conditions
    - Europe: 24%
    - North America: 15%
    - Other: 12%
  - Local companies with negative view: 38%
  - Main reason: Prohibitive laws, resistance from traditional Healthcare players

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Source: research2guidance - EU countries’ mHealth app market ranking 2015, n = 4,471
The market conditions in Germany for mHealth companies is far away from being best in class.

**COMPARISON OF MARKET READINESS DIMENSIONS**

*Source: research2guidance - EU countries’ mHealth app market ranking 2015, n = 4,471*
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

Source: research2guidance - EU countries’ mHealth app market ranking 2015

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