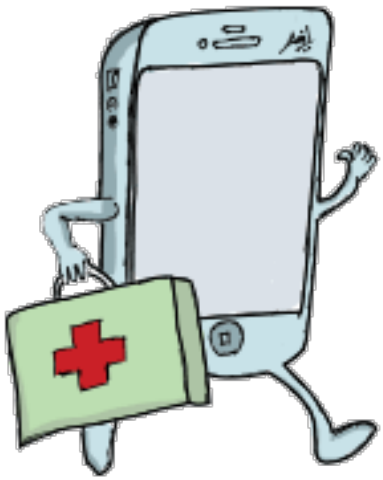
BioSpectrum the business of Bio & Health Sciences ASIA EDITION

# Health on your handheld

May 23, 2014 | Analysis | By BioSpectrum Bureau



**mHealth**
Capturing innovations at the intersection of mobile communications and health

*"mHealth market expected to reach $58.8 billion globally by 2020."*
***Allied Market Research Projections**

Valued at $6.7 billion in 2012, the global mHealth market is estimated to reach $8.3 billion by the end of 2013. The main driver of growth for this section of the digital health industry is the increasing per capita healthcare expenditure both in developed and advanced developing countries. The market, predicted Allied Market Research is further projected to reach $58.8 billion by 2020, at a CAGR of 32.3 percent from 2013 to 2020.

*The number of mobile phone subscriptions (6.8 billion) is nearly equal to the human population of 7.1 billion.*
***International Telecommunications Union (ITU) in 2013**

The ubiquitous access of smart mobile devices globally has enabled diagnostic and monitoring devices to render seamless healthcare services. Thus, this market is expected to grow at a significant pace in the next seven years.

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*One-third of mobile device owners have used their devices to track some aspect of their health in the last 12 months.*
**CEA survey 2013**

With the current technological advancement, integration of wireless technology with portable healthcare devices has become more than feasible. The increasing incidences of lifestyle diseases, cost and convenience factors, government initiatives, affordability of smartphones are other factors that promise the growth of this market.

**Karen Chupka**
**Senior vice president, International CES and corporate business strategy, CEA**
*"With huge improvements in health care technology and the introduction of powerful new sensors, consumers have unprecedented opportunities to monitor their health and engage more deeply in their personal health care."*

However, weak reimbursement policies, lower adoption due to lack of accuracy and technology infancy and uncertainty in the government regulations is expected to hinder the growth rate. Moreover, untapped markets in developing economies provide a lot of growth opportunities for this market due to increase in adoption of mHealth services to control the spread of communicable as well as non-communicable diseases. Such challenges can be very well taken by adoption of mHealth devices and services as they work irrespective of location and skilled professionals.
The sector has recorded high revenues generated from blood glucose meters, cardiac monitors and BP monitors.
Categorizing the regions that are bound to do well in this segment, the report pointed out that Europe along with North America accounted for about 55 percent of the overall market revenue in 2013 and probably would have recorded a reduction with growing demand in the Asia Pacific region.

**How does APAC fare?**
Mobile penetration across a number of APAC countries is above 100 percent, including Indonesia, Malaysia, the Philippines, Cambodia, Thailand, Singapore, Taiwan, South Korea and Australia.
Ã?Â¢Ã¢â??Â¬Ã?Â¢ Smartphone penetration in South Korea is at 82.4 percent
Ã?Â¢Ã¢â??Â¬Ã?Â¢ Smartphone penetration in Singapore at 74.2 percent

**Mohammad Chowdhury**
**Telecoms Industry Leader, PwC India**
*"Our estimates suggest that in spite of the advancements in medical technologies and a general increase in income levels, healthcare continues to pose challenges of affordability, complexity and access across the whole world. By contrast, mobile access is almost ubiquitous. With the increasing penetration of smart phones, innovative 'connected devices', and the proliferation of Mobile Broadband networks and services worldwide, the mobile device will play a far greater role in healthcare in both developed and developing countries in the future."*

**Market opportunities**
According to PwC's report, 'Touching Lives through Mobile Health: Assessment of the Global Market Opportunity', the mobile health market opportunity for India will constitute 8 percent of the total Asia-Pacific opportunity in 2017.

The growth of the mHealth market will lead to a revenue opportunity worth US$ 0.6 billion (Rs 3,000 crore) for India and US$23 billion for the world by 2017.

India has witnessed significant activity in the mobile health space with the launch of several different services, however the majority of initiatives are focused on spreading prevention and awareness messages.
Ã?Â¢Ã¢â??Â¬Ã?Â¢ Europe to become the largest mHealth region by 2017 with revenues of US$6.9 billion.
Ã?Â¢Ã¢â??Â¬Ã?Â¢ Asia Pacific would be the second-largest region with revenues of US$6.8 billion
Ã?Â¢Ã¢â??Â¬Ã?Â¢ North America could account for US$6.5 billion; Latin America US$1.6 billion and Africa US$1.2 billion
Ã?Â¢Ã¢â??Â¬Ã?Â¢ Revenues in China and Japan could reach US$2.5 billion and US$1.4 billion respectively
Ã?Â¢Ã¢â??Â¬Ã?Â¢ Monitoring services, such as those for chronic disease management, will account for 65 per cent of the market (US$15 billion) by 2017
Ã?Â¢Ã¢â??Â¬Ã?Â¢ Diagnosis services will be the second-largest segment, comprising 15 per cent of the global mHealth market (US$3.4 billion)

**Siddharth Vishwanath**
**Executive director, PwC India**
*"While the opportunity for mHealth services in India as well as globally is huge, for it to fall into place and become an effective tool of social inclusion the government and the entire healthcare ecosystem will have to work together even as they compete on other fronts so that the benefits percolate to the segment which most requires it. Favorable government policies and regulatory regimes will be crucial for scaling up mobile health."*

**76 percent mobile health app publishers view diabetes as the therapeutic area with the highest business potential for mobile health.**

*Currently only 1.2 percent of people with diabetes who own a smartphone or tablet use apps to manage their condition. This will increase to 7.8 percent, or 24 million people, in 2018.*
***Annual survey by Research2Guidance**