

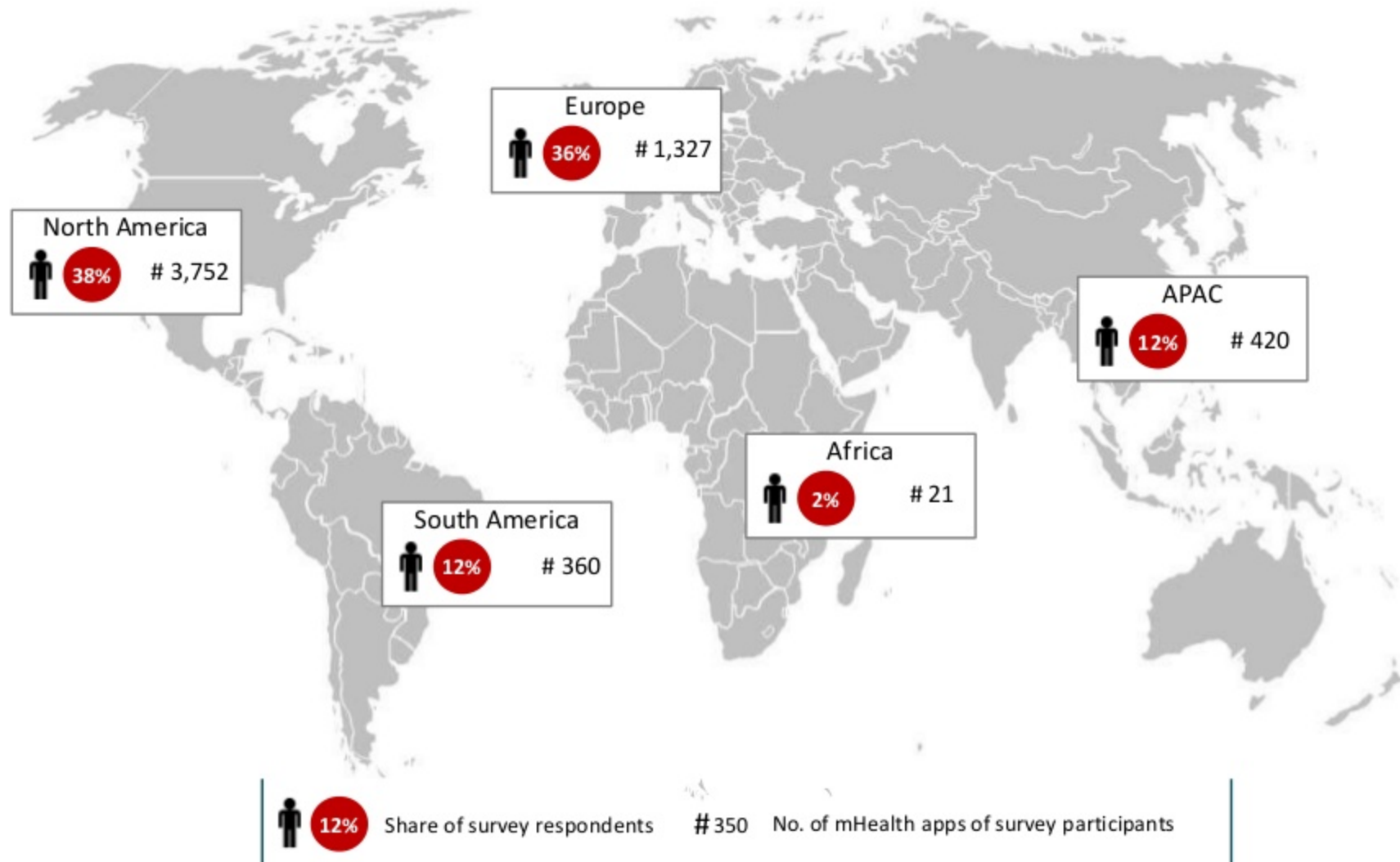
# mHealth App Developer Economics 2014

Largest Global Study on mHealth App Publishing

May 2014

# The „mHealth Developer Economics 2014“ is the largest study on mHealth app publishing globally

## Survey participants and mHealth app numbers by region



Source: research2guidance, mHealth App Developer Economics Study 2014

# Research2guidance is a market leading analyst and advisory company in the mHealth app market

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the app market specialists

## About research2guidance

research2guidance is a strategy advisory and market research company. We concentrate on the mobile app eco-system. We are convinced that mobile health solutions will make a difference to people's lives and that the impact on the healthcare industry will be significant. We provide insights to make it happen and to successfully lead your business.

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# This is a summary presentation of the „mHealth App Developer Economics 2014“ report



## The largest global study on mHealth app publishing

- ✓ Read through this summary presentation and
- ✓ Download the full 42 page report (**Get a free copy [here](#)**)
- ✓ Share it and
- ✓ **Get in contact.** We want to hear your thoughts on how mHealth app publishing will develop in the next 5 years

**[www.mHealthEconomics.com](http://www.mHealthEconomics.com)**

## ***“What are the topics?”***

### **Current status of the mHealth app publishing**

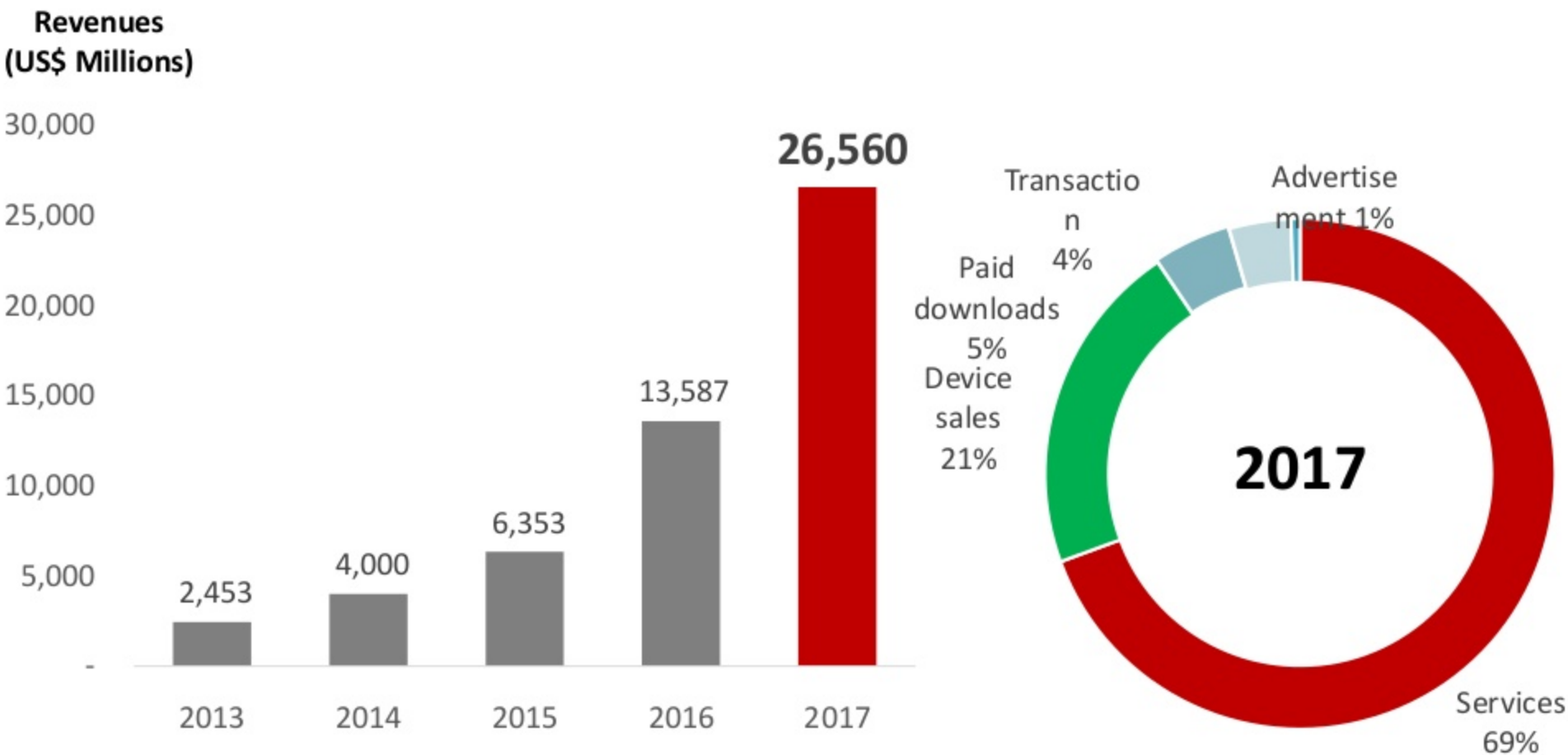
Who is publishing and what can be learned from successful mHealth app publishers

The Connected Elite

Outlook

# The mHealth app market will reach USD 26bn revenue by 2017

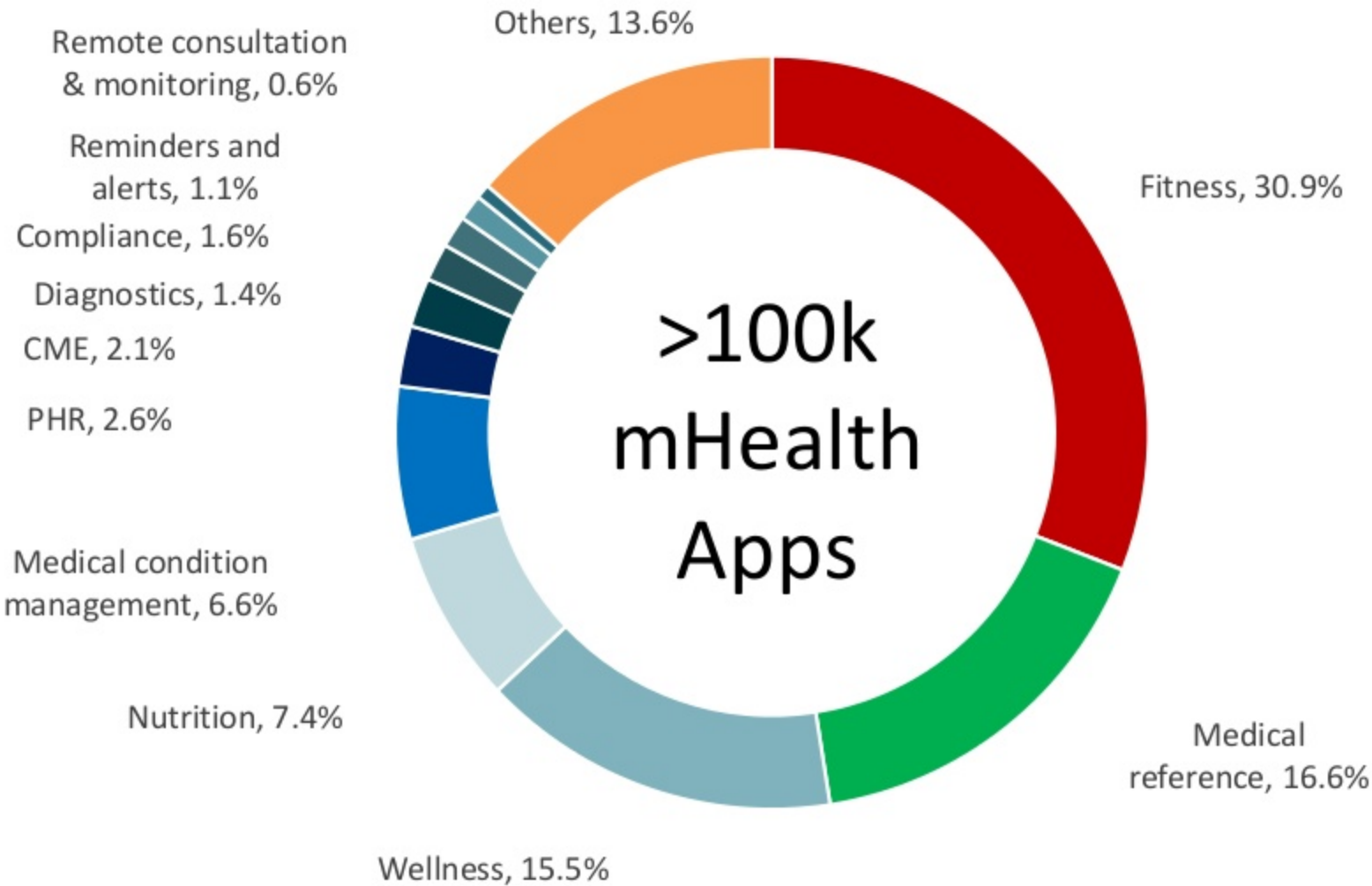
Global mHealth market revenue in USD (2013-2017)



Source: research2guidance, mHealth App Market Report 2013-2017

# Fitness and medical reference apps are the largest mHealth app categories

## mHealth app category share



Source: research2guidance, 808 apps from Apple App Store, Google Play, BlackBerry App World and Windows Phone Store (March 2014)

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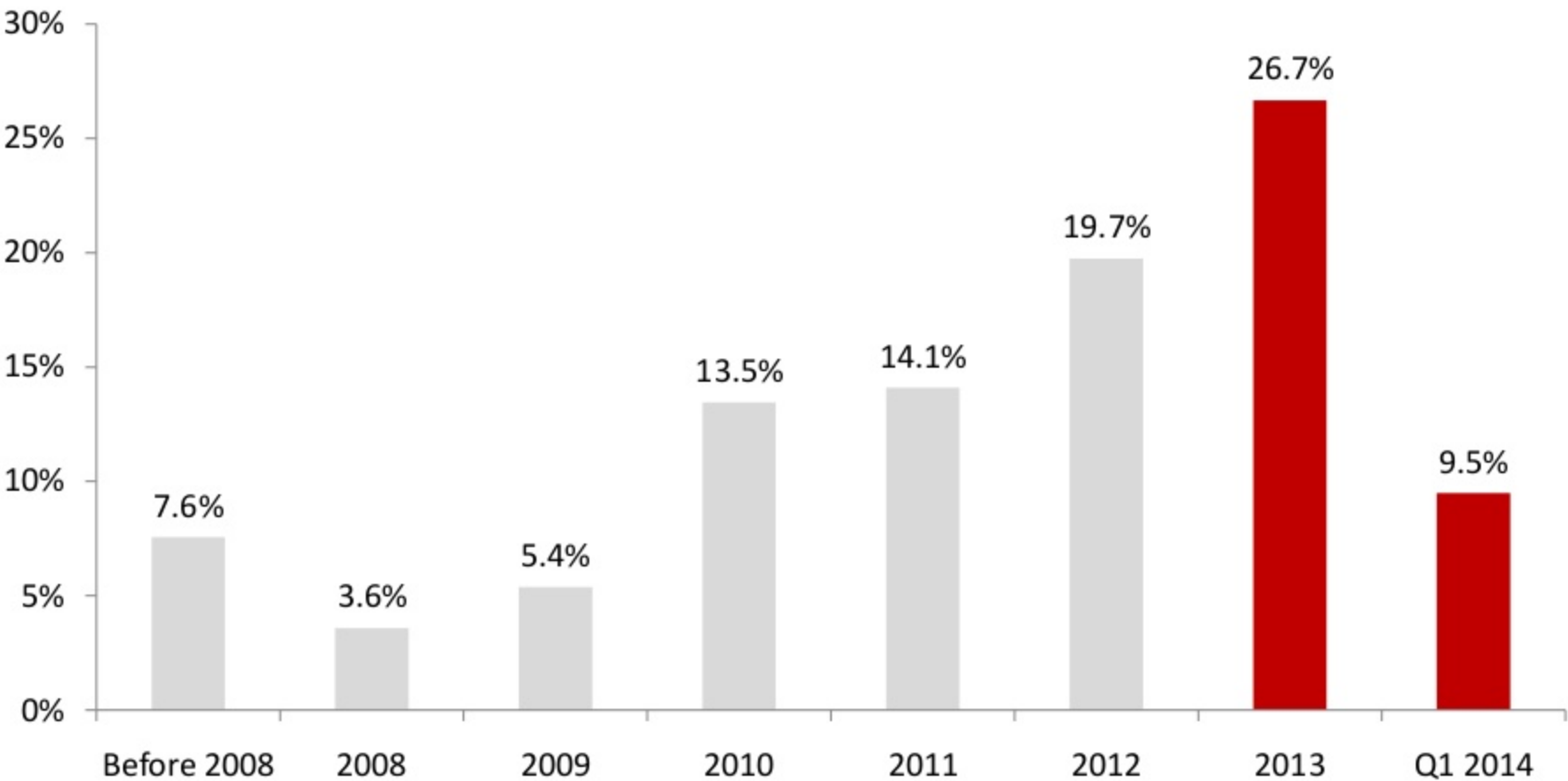
The Connected Elite

Outlook



# More than 36% only recently entered the mHealth app market

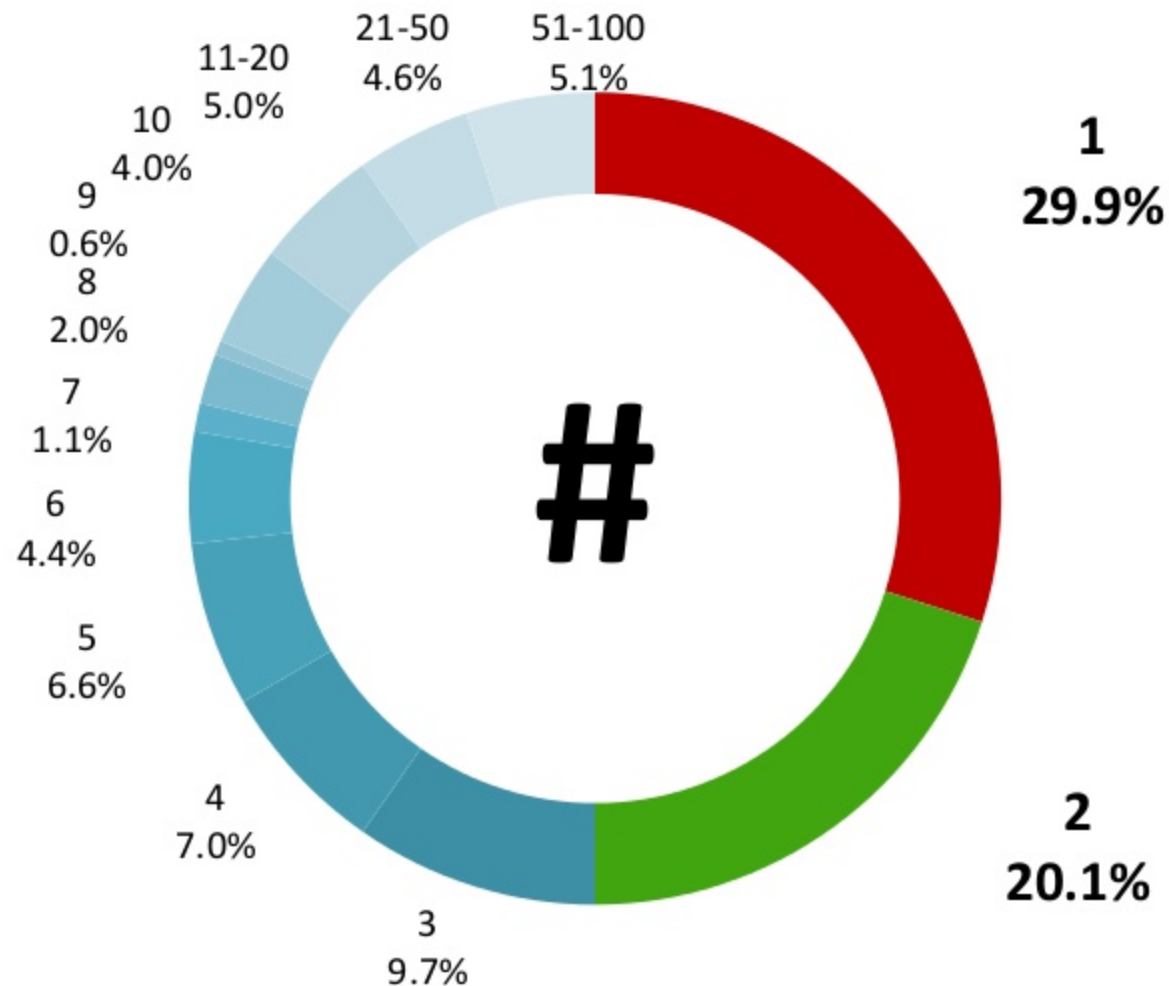
Publishing year of the first mHealth app



Source: research2guidance mHealth App Developer Economics survey 2014, n= 2032

# 50% of mHealth app publisher have released only one or two mHealth apps

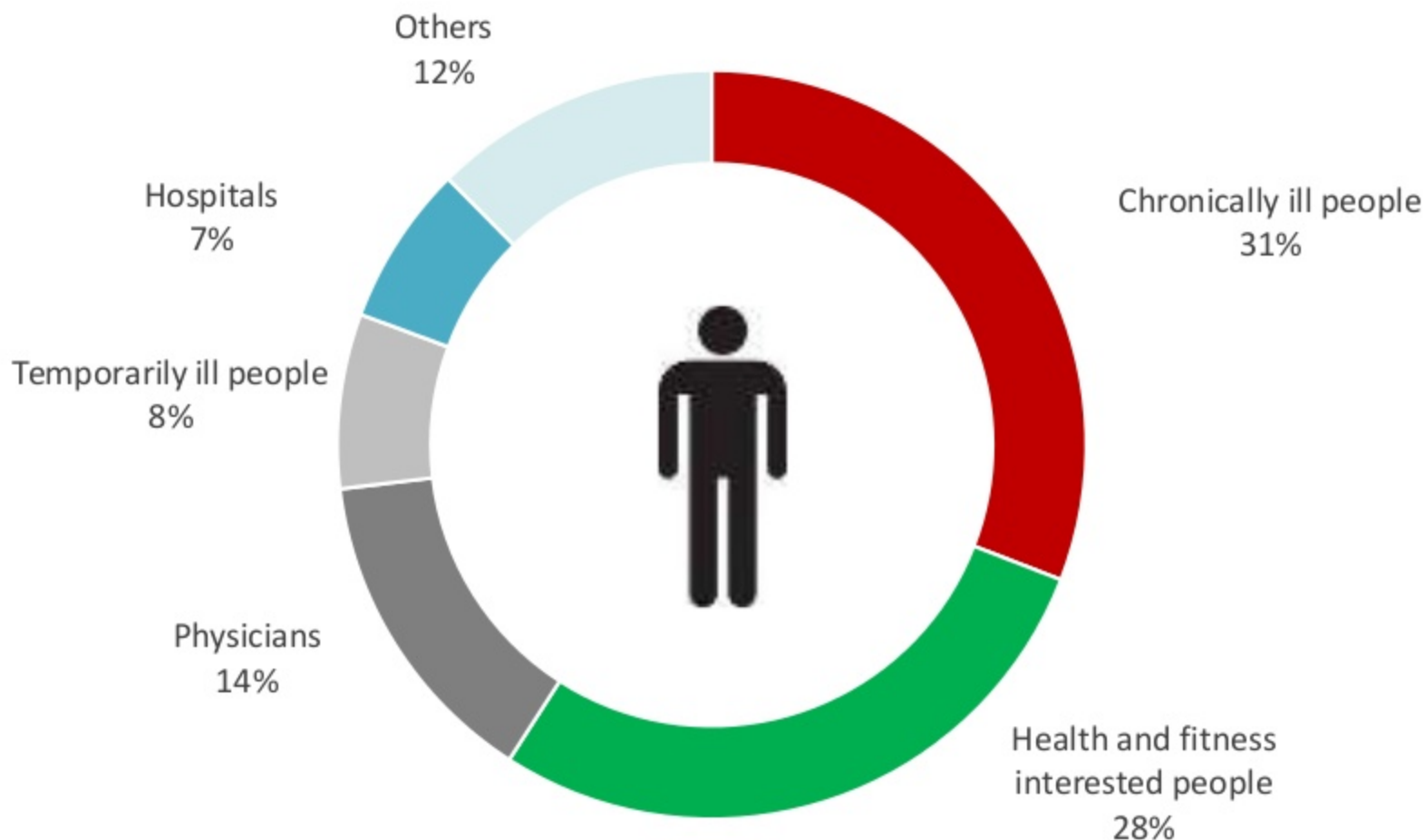
Publisher share of mHealth app portfolio size



Comment: An app that is published on multiple platforms is counted as one app.  
Source: research2guidance mHealth App Developer Economics survey 2014, n=2032

# Chronically ill and fitness seekers are the main target groups for mHealth app publishers

## Target group share of mHealth app publishers



Source: research2guidance mHealth App Developer Economics survey 2014, n=2032

# There are six groups of mHealth app publishers that are behind the apps

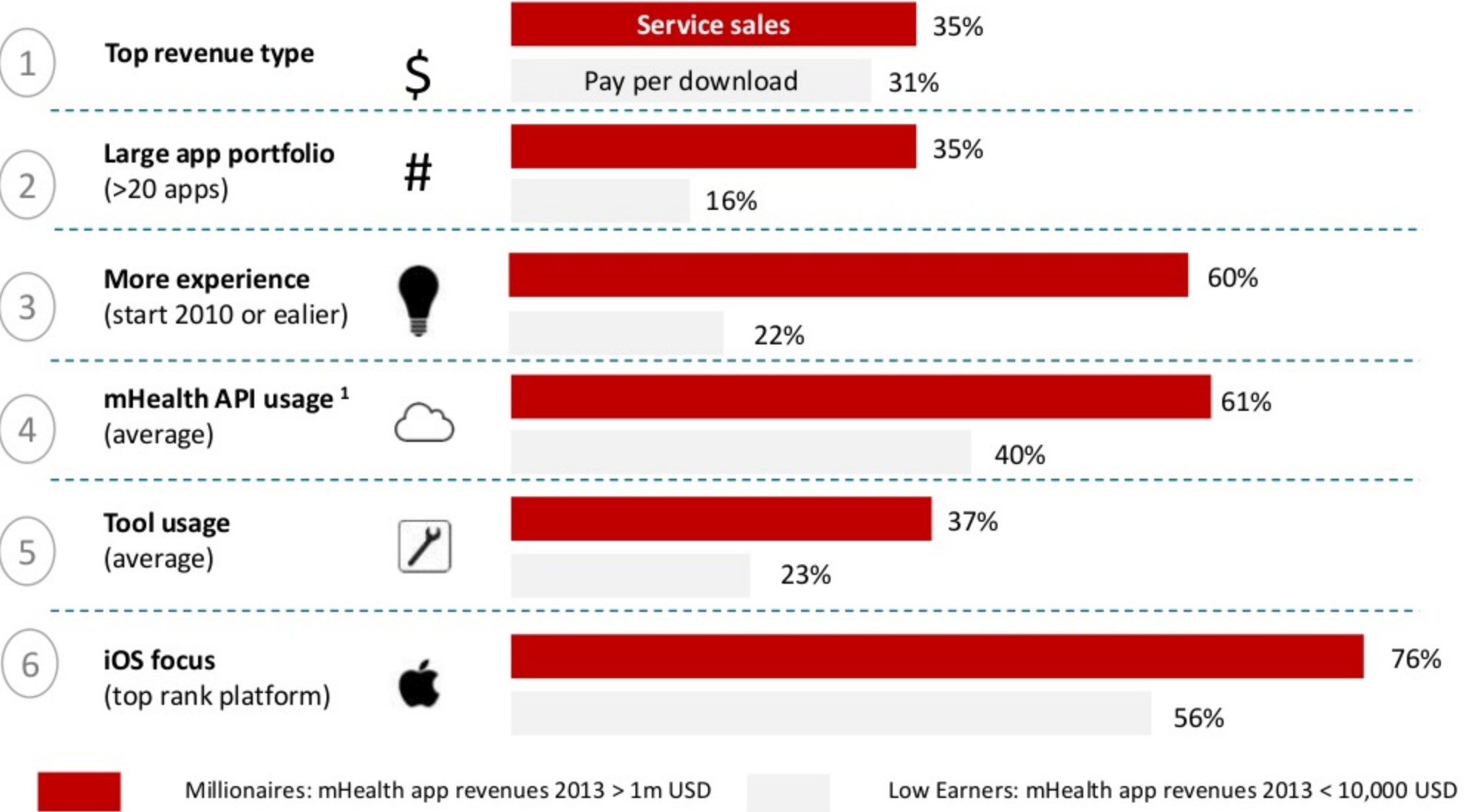
		Establ. Health Players	App Specia- lists	Helpers	Medical Specia- lists	Fitness Specia- lists	Con- necters
Percentage of total	%	3 %	14 %	32 %	20 %	10 %	18 %
Medical expert in team	+	57,6%	40,1%	47,5%	100%	43,7%	49,7%
Typical company size	👤 👤	5,000+	3-10	3-10	3-10	11-100	11-100
Goal of apps	🎯	Brand awareness	Revenue	Help people	Help people	Revenue	Revenue
APIs usage	☁	low	average	average	average	high	all
Tool usage	🔧	low	high	average	average	high	very heavy
Downloads (<5k/ >1m)	⬇	43.3% / 6.7%	60.1% / 6.4%	61.2% / 5.8%	58.6% / 6.3%	44.6% / 7.4%	53.1% / 7.7%
Revenues (0/ >1m)	\$	67% / 3.2%	25.7% / 7.8%	51.4% / 5.1%	42.7% / 9.1%	39.4% / 7.4%	39.0% / 8.9%
Goal achieved		⬇	➡	⬆	➡	⬆	⬆

Goals achieved: ⬆ Mainly yes ➡ Partly ⬇ Mainly not

Source: research2guidance mHealth App Developer Economics survey 2014, n= 2032



# Commercially successful mHealth publishers do 6 things differently



Source: research2guidance mHealth App Developer Economics survey 2014, n= 2032

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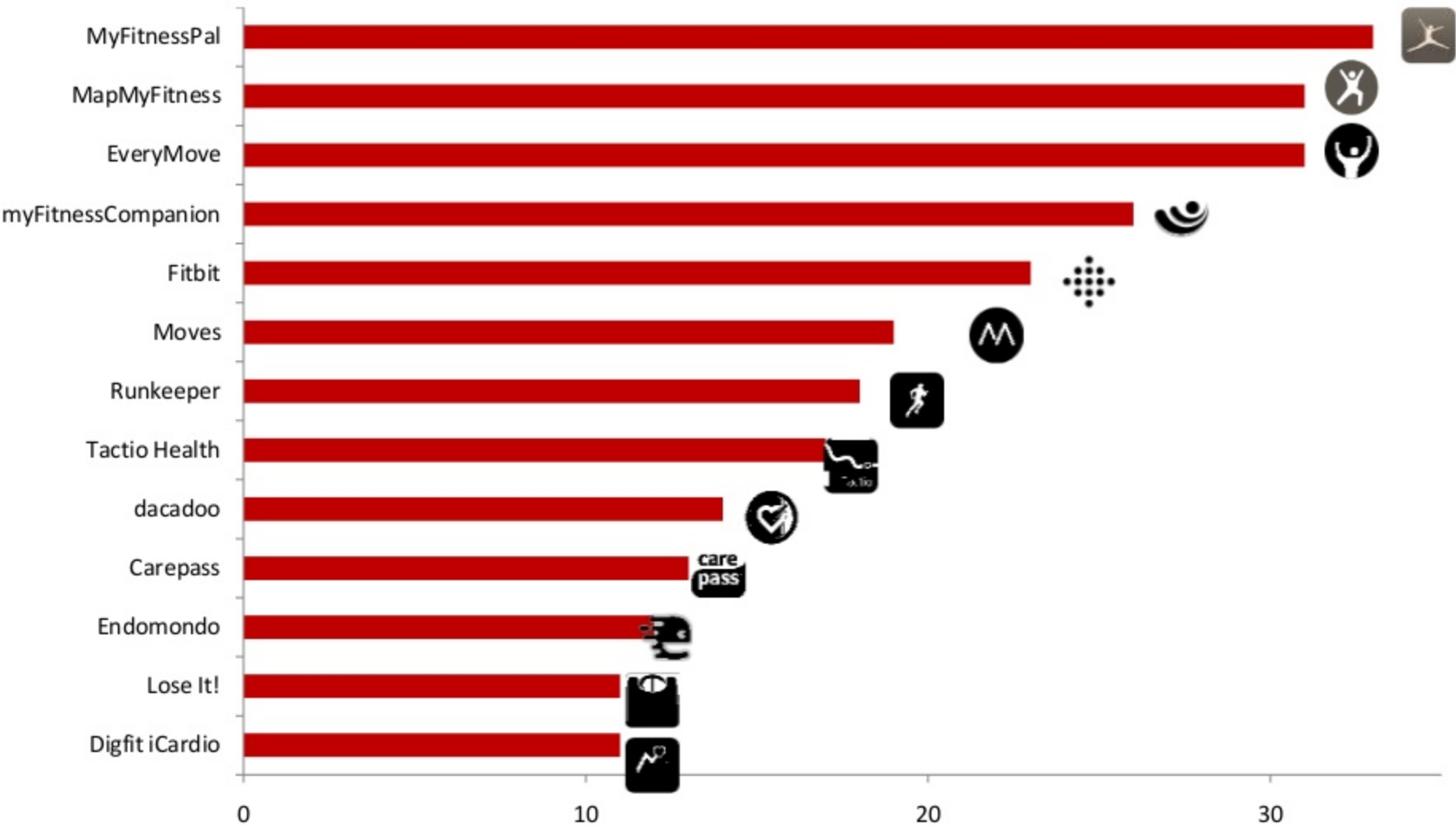
Who is publishing and what can be learned from successful mHealth app publishers

**The Connected Elite**

Outlook

# There is a “Connected Elite” of mHealth app publishers that drive interoperability between apps and sensors

No. of connected app publishers & sensor vendors by an app



Source: research2guidance and app & vendor data (March 2014)

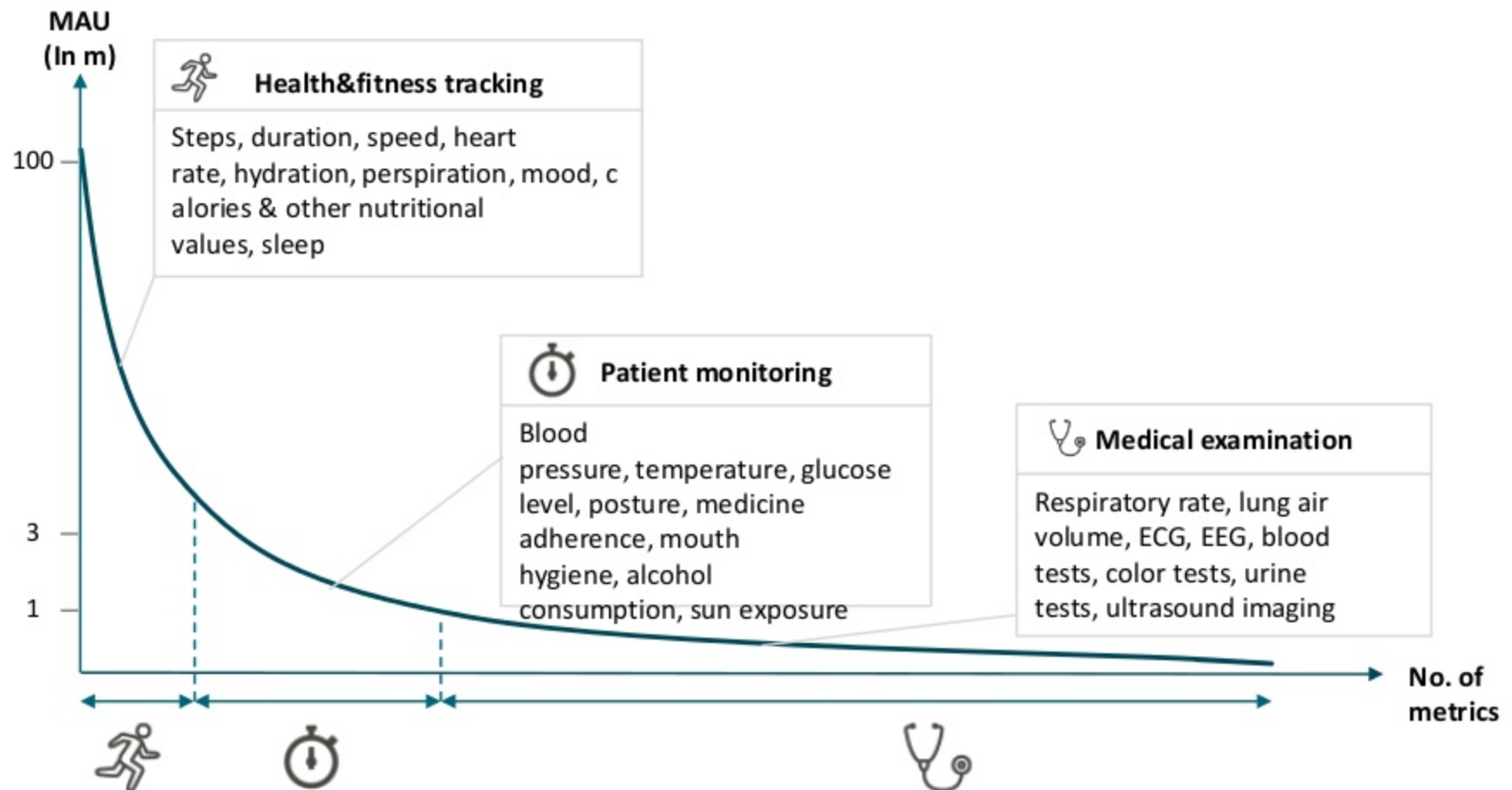
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# Up to 100m vital metrics are collected regularly

## mHealth measures by Monthly Active Users



Source: research2guidance

MAU: Monthly active users that track health parameters

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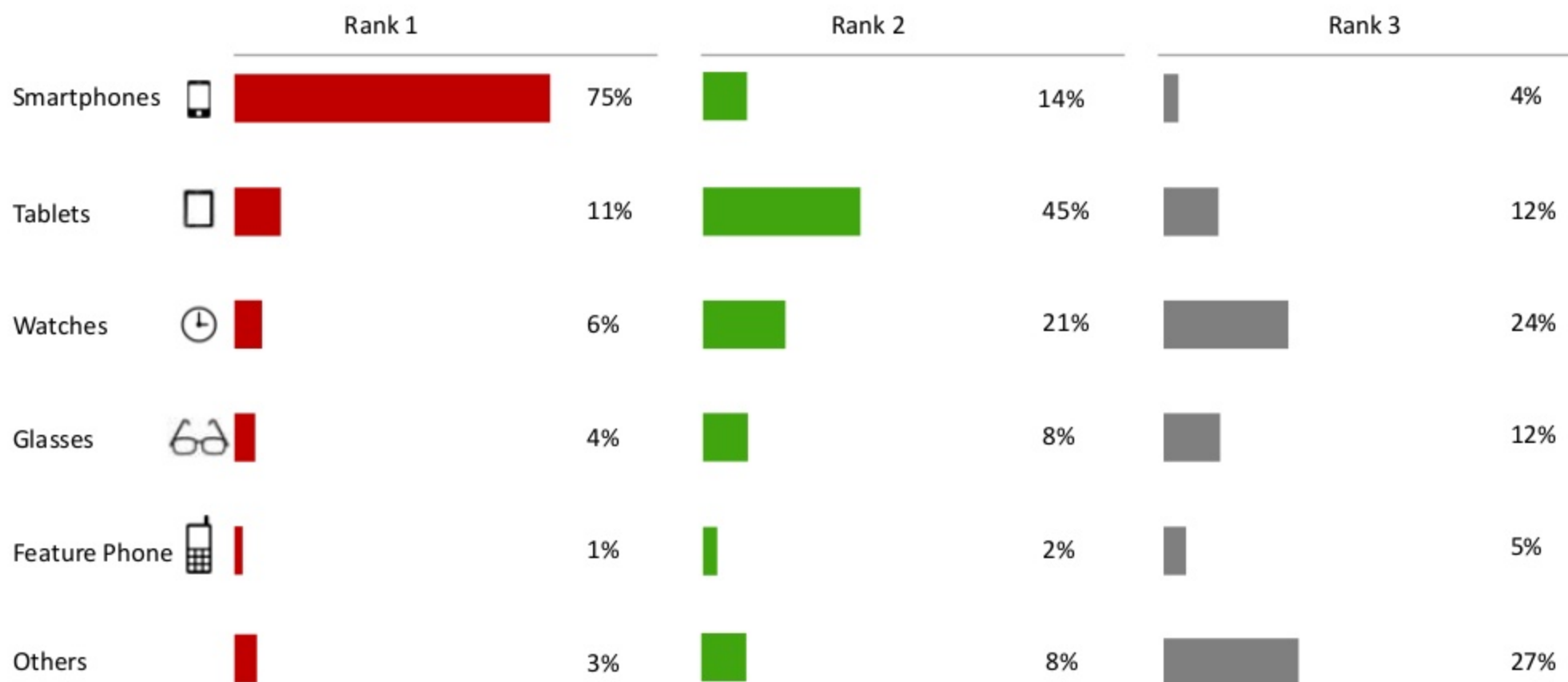
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**Outlook**

# Smartphones are the primary device for mHealth apps

Devices with highest business potential for mHealth app by rank in 5 years

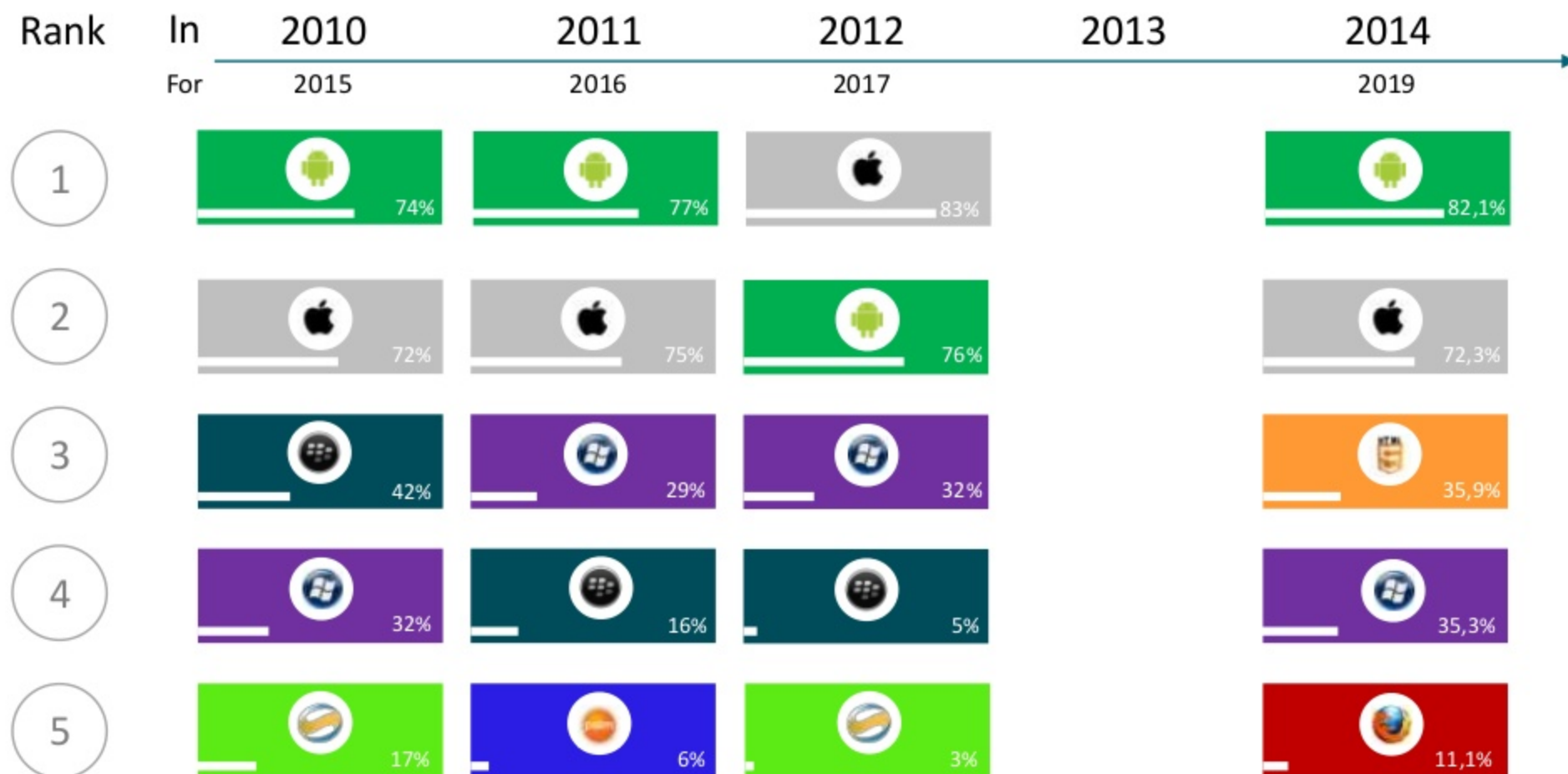


Comment: Figures do not sum up to 100% as not all participants provided answers for the rank 2+3

Source: research2guidance mHealth App Developer Economics survey 2014, n=2032

# Android and iOS remain the top ranked operating systems for mHealth app publishers in five years time

Mobile operating systems with highest business potential for mHealth apps by rank in 5 years



Source: research2guidance mHealth App Developer Economics survey 2010, 2011, 2012 and 2014, n= 2032