

The Impact of Mobile Health on Patient-Centric Disease Management

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Abstracts

Banks use them. So does the travel industry. And tastemakers are harnessing their power every day. Now, it's pharma's turn to explore mobile and digital apps.

In an age where patients are well-informed and thus have a stronger-than-ever sense of ownership over their disease, there is mounting evidence that mobile health apps are affecting outcomes. Well-designed and intuitive, health apps can helping clinicians and healthcare providers better manage treatments, even after they leave the consulting rooms. As a result, patient adherence can improve.

So what's in it for the pharmaceutical industry? Better health outcomes mean improved market access and greater brand loyalty. What's more, as pharma taps into the mobile health industry—set to grow to US\$30 billion in three years, according to some estimates—real world data looped back from platforms will have far-reaching implications for drug development and clinical trials.

Through *The Impact of Mobile Health on Patient-Centric Disease Management*, FirstWord explores the emerging and exciting world of mobile and digital health apps. Based on interviews from nine industry experts, reviews of clinical and commercial opportunities and case studies, the report offers insight into app development, integration, and how the industry can capture the market now and in the future.

Key Report Features

Expert opinion from those working at the forefront of the emerging mHealth industry, including experts from GlaxoSmithKline, Boehringer Ingelheim, UCB and Janssen Healthcare

Overview of clinical and commercial opportunities and realities, with implications for patients, clinicians and pharma

Case studies of new, established and successful platforms, covering diabetes, schizophrenia, adherence, cognitive behavioural therapy and epilepsy

Insight into the use of data for clinical patient management

Key Benefits

While mobile and digital health apps are relatively new to pharma, there are clear signs they present excellent opportunities for the industry. In *The Impact of Mobile Health on Patient-Centric Disease Management*, FirstWord explores this exciting new area. Amongst the benefits, this report will help you to:

Understand the parameters of the booming mobile app business, as it applies to pharma

Learn the critical path for development of apps, platforms, gamification and optimising patient engagement

Understand how real world data gathered can make a difference in drug development and meeting demands for data from regulators and reimbursement agencies

Develop key knowledge about how mobile, digital and healthcare industries will grow together

Key Quotes

“Use of these platforms means that patients are taking responsibility for themselves; that’s the magic bullet in a way, and that gets a win for everyone.” David Proudlock, GSK

“Effectively, the healthcare professional or other stakeholder starts to have a better view of the patient’s clinical management outside of the consulting room, helping to

prevent events, and enabling the provision of care for patients remotely. It's a very different experience for patients, but it's certainly something that patients tell us they want to see happen." Michael Morgan-Curran from the GSMA.

"If we say to a payer, we have a drug but we also have a proven and remote monitoring device through a partner company so when a patient gets the drug they also get the mobile health device or app and we have proven studies, then we might be in a preferential position compared to a competitor molecule. We would have a better position from a market access perspective." Wolfgang Renz, Boehringer Ingelheim.

The Impact of Mobile Health on Patient-Centric Disease Management answers key questions:

How can pharma harness the mobile and digital app industry?

What returns can pharma expect by developing mobile and digital apps?

What are the most successful apps to date and what garnered their success?

What are the key benefits of mobile technology for pharma, patients and physicians?

What is the future of digital and mobile health apps?

Expert Interviewed:

Larry Brooks, Director, Business Model & Healthcare Innovation at Boehringer Ingelheim Pharmaceuticals, Inc. (BIPI).

Tony Free, developer of iThinkSmarter smartphone app and cognitive behavioural therapist, Yorkshire, UK

Graham Howieson, CEO at GP Solutions (UK) Ltd, in Manchester, UK

Navin Joshi, Senior Director, Customer Solutions in Access to Medicines at GlaxoSmithKline.

Marco Mohwinckel, partner at Janssen Healthcare Innovation, Europe, Middle

East and Africa.

Michael Morgan-Curran, Global Director of mHealth & Diabetes Programme Director at the GSMA (GSM Association).

Roger Palframan, Head of Innovation Super Networks at UCB

David Proudlock, Director, Innovation and Disruptive Technologies - UK Pharma at GlaxoSmithKline.

Wolfgang Renz, Corporate Vice President, Business Model & Healthcare Innovation, Boehringer Ingelheim based in the U.S.

Content Highlights

Mobile and digital health apps are being developed with great success in pockets of the industry. In this report, you will discover:

The importance of digital platforms and mobile apps in providing integrated health solutions

The hidden value of mobile apps in collating, distributing and analysing real world data

The current state-of-play for regulations, leading up to the FDA's pending guidance on mobile apps

About

The evidence so far suggests that the power harnessed within mobile and digital technology advances at a rate that exceeds healthcare's ability or at least willingness to adopt it. Yet, as this report strongly suggests, there are growing pockets of interest within pharma and the telecommunications industry willing to explore the opportunities promised by this potentially fruitful marriage between healthcare and mobile and/or digital innovation.

Payers, regulatory authorities and clinicians make ever more stringent demands not only for extensive data, but for added value services to enhance the patient's sense of ownership of their disease. Importantly, all these changes, affecting patient to payer, are being firmly underpinned by the power of digital. Estimates of the size of the mobile health industry vary widely, from a US market of US\$4.5 billion in the next two to three years, to a global market of US\$30 billion.

Mobile and/or digital health solutions used in healthcare include applications (apps) for smartphones, tablet computers and PDAs. These are often supported and integrated with online programmes used by patients who may take a particular medication related to the programme. Importantly, the lines demarcating the regulations on how mobile and digital platforms can be used in association with a company's medication vary depending on the geographical location of the market.

Of note, experts interviewed for this report point out that a well-designed mobile and/or digital platform can help patients understand, monitor and control their condition effectively. This creates a 'win-win-win', scenario for patients, clinicians/healthcare providers (HCPs), and the pharmaceutical industry.

Effectively, if patients use the company's drugs as intended and the clinician and patient feel more satisfied with the treatment then the pharmaceutical company should benefit from continued use of its product and less switching.

Now, more than ever, patients have greater influence in the decision-making process relating to the management of their disease, so new means of engaging with, and empowering, patients are welcomed. Patients are increasingly being considered as more than the recipients of drugs, and as equal or even dominant stakeholders in a partnership that is taking a progressively holistic approach to disease management. Healthcare today is about managing the patient outside the consulting room and

hospital as much as it is inside.

Mobile and digital health technology has a role to play in changing health-related behaviours and, in particular, the pressing issue of medications adherence. This report shows that adherence is a complex issue that requires more than technology alone to resolve it, but mobile health technologies have a lot to offer if used intelligently. Some pharmaceutical companies are engaging with the opportunity here. Janssen Healthcare Innovations, for example, is soon to launch a platform called Mobile Health Manager in Europe; it is already available in the US. It is a two-way communications platform to help improve patient adherence. The messaging platform provides free customised alerts that remind patients to take their medication, refill their prescriptions and visit their healthcare professionals. AT&T, the USbased telecommunications company, has also launched a much-lauded platform called Diabetes Manager.

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